



**FINAL REPORT**

**OF THE**

**COMMISSION FOR**

**EFFICIENT TOWN GOVERNMENT**

JUNE 2004

**Copies of this report, which include all appendices, may be found at the Westford Town Managers office or at the J.V. Fletcher Library.**

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# Part 1

## Executive Summary

The Commission began its life as the Blue Ribbon Commission with a meeting in the police meeting room on June 13, 2002. We soon learned we are a diverse group with varied backgrounds and experiences and a joint commitment to finding ways to assist in dealing with Westford's current financial challenges.

The group consisted of:

### Other Committee Affiliations

Nancy Rosinski, Chairman	<i>Land Use Priorities Committee Westford Land Preservation Foundation</i>
Margaret Murray, Vice-Chairman	<i>School Committee Land Use Priorities Committee</i>
Bob Jefferies	<i>Selectman Permanent School Building Committee Planning Board Historical Commission</i>
Evan Shapiro*	<i>Council on Aging</i>
Jim Sullivan	<i>Finance Committee</i>
Bob LaPorte*	<i>Land Use Priorities Committee</i>
Kirk Ware	<i>Land Use Priorities Committee Permanent School Building Committee Stony Brook Master Plan Committee</i>
Bob Waskiewicz*	<i>Roudenbush Community Center</i>
Lauri Carrick <sup>x</sup>	<i>School Committee</i>
Kevin Caffrey <sup>x</sup>	
Ex Officio:	Steve Ledoux, Town Manager Suzanne Marchand, Finance Director

Unfortunately, due to time constraints, we lost three members along the way (noted by asterisks), and we were fortunate to attract two new members (noted by x), Lauri Carrick and Kevin Caffrey.

We decided early on that our name needed to be changed to the Commission for Efficient Town Government to more accurately reflect our actual task.

Before setting out, in reaction to concerns expressed by various town staff about the Commission's purpose, the Commission decided to set a tone of teamwork and cooperation, by first preparing a Commission Value Statement, as follows:

*The committee will be guided by the values of Innovation, Respect, Responsibility and Responsiveness.*

- *The magnitude of Westford's financial challenge will require innovative ideas and the ability to champion change.*
- *We will be respectful and honest in our interactions with each other and with all Town departments and committees, and we will strive to work collaboratively to jointly meet the financial challenges ahead.*
- *We assume the responsibility for completing our individual assignments and the Committee "Overall Plan" within the two-year term.*
- *We will be responsive to the spirit of the 2002 Annual Town Meeting characterized by the residents request for precise and clear data and efficient government.*

*It is our hope that Westford will emerge from this period of extreme financial challenge as the fiscally and socially responsible, cohesive, community-minded Town of which we are so proud.*

## Plan

Within a few months we completed our second task, which was the establishment of an overall plan of attack (see attached Appendix A) which included: (1) a consideration of the level of service (mandated services versus traditional services) provided in each of our departments; (2) an attempt to understand how our departments stacked up against other similar towns and relevant municipal metrics on spending, staffing and revenue generation; (3) an evaluation of organizational charts for efficiency and possible duplication; and (4) an evaluation of departments for options for additional revenue generation such as fees, grants or sale of assets and cost reduction opportunities. The plan called for us to review our budget process to ensure all costs of each department were clearly isolated and accounted for within the department and to investigate how department heads could be rewarded for under spending their budgets and not penalized in future years. We also planned to try to find ways to perpetuate the improvements our report would suggest.

## Process

Looking at various budgets and other financial documents, we initially decided to study the seven largest departments (Schools, Police, Highway, Fire, Library, Parks/Recreation and Cemetery, and Human Resources).

In order to streamline the process, we developed a uniform questionnaire for each to complete prior to our meeting with them (refer to Appendix B for all department responses). Generally, a considerable amount of effort was put into responding to these questions so that when we met with department heads our questions were more focused. By and large, department heads were very open about their operations, staffing, capital budgets and management decisions. After each meeting with the department heads, we brainstormed our ideas for savings or revenue generation. In the process of brainstorming, we discovered that some of our ideas were generic across departments, such as centralized purchasing, so we established a list of general ideas. We also realized there was often a legislative roadblock to savings, such as the prevailing wage rules, so we established a list of possible legislative changes. In June 2004 we met with our legislators to share our ideas with them.

Our next step was to assign specific commission members to follow up with each department to ask more detailed questions and to do more in depth study of specific ideas of the Commission with the assistance of staff. As one might expect, feedback varied from complete support to strong resistance to ideas that were presented. Where responses were in writing, we have included them in our report. This process resulted in more detailed findings that are found later in this report. Due to varying time availability of Commission members, the number of specific recommendations varies by department with more study and recommendations in some departments than in others. Also, due to the size of the school budget relative to all other departments, three members were assigned to that department. This also explains why our interim report, issued in December 2003, is uneven relative to different departments. During this phase we also lost three members.

At the same time the departmental work was proceeding, we reviewed and approved a charter for establishing a Permanent Building Committee to oversee town-wide construction activities and capital expenditures to ensure continuity, professionalism and expertise, rather than to rely on ad hoc committees. This uses the model of the Permanent School Building Committee which has successfully shepherded six school projects through a complex design, approval and construction process on time and within budget at a time when most towns surrounding us have had extreme difficulty meeting budgets and getting schools open on schedule. It was gratifying to the board to see this recommendation implemented by the Board of Selectmen during our tenure.

In late 2003 we added four additional departments to our list: Board of Health, Permitting, Planning and Conservation, Council on Aging and Solid Waste/Recycling. Due to time constraints, the commission elected to brainstorm ideas and discuss them with the department heads, then add them to our list without a further detailed study.

One thing that affected all of us was the immensity of the task as we investigated each department; there were only so many options we had time to explore. We were hampered by the fact that comparison with other towns was not easy since towns cluster the services within their departments differently. Some towns contract certain services out and other handle them in-house and some towns manage billing, maintain buildings or do purchasing centrally. We also found that variations in staffing could be traced to the fact that towns of similar population may have dissimilar cost of living, roadway mileage or other features.

In our investigation, we found a lot of professionalism and pride of our staff in their work, some territoriality, generally an openness to new ideas, some intransigence, much hard work to answer our detailed questions and challenging inquiries, and a general willingness to engage us in the process. One of the questions we asked each was what services they provide others and what other departments provide them, and we were all struck by the answer of Joanne Sheehan at the Council on Aging:

*“Highway and water departments plow, sand and sweep. Park department mows and weeds. Fire department checks building and defibrillator. Health department provides clinics. Housing Authority provides space. Bookmobile to Cameron and senior homes from the Library. Police Department completes well being checks. Roudenbush Community Center joint fundraising. School department maintenance provides heavy lifting and transportation of large items and storage of hospital beds. Accounting processes bills and payroll. Human Resources provide employee assistance. Treasurer processes revenue. Town Clerk posts meeting. Tax Collector collects taxes at the Senior Center on a quarterly basis. Town Manager provides support and guidance. Technology provides support. GIS provides scanning and maps.”*

This answer represented for us what is admirable in Westford, namely, an understanding that we are all in this together and a willingness to pull together on the oars in the same direction, even if it personally costs us a little bit, as long as there is a benefit overall for the Town and its people.

That is the tone with which we began and with which we complete our task and offer our suggestions in the spirit that we truly believe they can and will improve the way that we operate and will allow us to more carefully and efficiently spend our limited resources in this time of financial constraint. We hope our Town leaders will consider these ideas carefully and study them thoughtfully to see if the implementation can make us a better, more smoothly functioning municipality.

## Part 2

### **How to Ensure That Commission Ideas Are Used and That the Focus on Cost-Cutting Continues**

Commission members, department heads and members of various boards invested many hours discussing, exploring and investigating cost saving ideas. The impetus behind all these ideas came from our charter to help narrow the gap between revenues and expenses. The Commission's work is complete with the publication of this report; the Town's work of using this document as a tool in closing that gap has just begun.

How can Westford ensure that the Commission ideas are used or more fully explored and that we continue to close the gap between revenues and expenses? There are two steps to achieve this goal. One step would be to develop a new (or modify an existing procedure) so that it included the implementation or further investigation of the Commission's recommendations. For example, the yearly management goal setting process could be modified to include one or two cost-saving goals every year. The individual contributor's performance evaluation form could also be modified to include cost savings initiatives as a metric. Boards might also incorporate a cost-saving focus in their yearly self-evaluation instruments.

The second step is less formal but represents a cultural shift that includes a cost-benefit analysis at key decision points. Department heads naturally want to create departments and functions that are models for the Commonwealth; it is part of our culture to be on the cutting edge. That cutting edge comes at a price; we must continually ask ourselves at every juncture, can we afford to be that model?

# Part 3

## List of Ideas

The attached matrix contains the Commission's suggestions on opportunities for cost reductions or areas of revenue generation for the Town of Westford. These ideas were generated from our collective knowledge and brief introduction to each department, and only scratch the surface of areas of opportunity. The department heads, with their vast experiences and knowledge, should have many more ideas than we came up with to reduce costs in their respective departments. It is our hope that this report initiates some changes in the way we do business in Westford.

This matrix is organized by department, which are listed in alphabetical order. The far right column indicates if there is a summary of findings enclosed in the report that further explains the idea and outlines the potential for financial savings.

Commission for Efficient Town Government		
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No.	Revenue Generation/Cost Reduction Ideas	Page
<b>Board of Health</b>		
1	Conduct a full cost analysis (direct and in-direct expenses) for all services provided, i.e. inspections and programs. Evaluate the fees charged for these services compared to the total cost to provide them. Analyze whether it is beneficial to continue the service and/or if the fee should be raised to cover all the costs associated with providing it. If fees are raised for programs, allowances should be made for those that cannot afford the new fee.	
2	Implement fees for re-inspections to cover the costs of this activity and encourage people to follow the Board of Health regulations and prevent re-inspections from being required.	
3	Focus emergency preparedness on those incidences that have a higher likelihood of happening in Westford rather than those incidences that have a very remote chance of occurring in Westford. This focus will allow our personnel to spend their time on activities that are more beneficial for our community. When working on local preparedness, focus on developing a community plan which coordinates responses with other town departments, i.e. Fire and Police. Look for grant money to help cover costs for local preparedness, i.e. radios to allow for communication amongst all personnel that may be involved in an emergency situation.	
4	Evaluate utilizing alternative communication mechanisms, i.e. a web page, channel 8 or a recorded message in our phone system, to provide information on areas of concern to the public, i.e. a SARS update. This will potentially reduce the number of calls that are made to the Board of Health that currently occur to provide updates on current health concerns.	
5	Evaluate all inspections that are currently conducted for appropriateness and focus our inspectors on those areas that will provide the greatest public benefit. I.e. is it necessary to inspect local companies to ensure compliance with the smoking regulations vs. just responding to complaints?	
6	Evaluate the local food inspection requirement for what is truly essential. For example, is it really necessary to inspect for bazaars and block parties? Focusing on those activities that are essential will free up our resources to work on more value added activities.	
<b>Council on Aging</b>		
7	Pursue obtaining third party payment, (filing for payment from the users health insurance company), for all applicable work performed by the departments Social Worker in an effort to cover the cost of this service.	
8	Evaluate the use of volunteers in the department and determine the benefit of the service provided vs. the time and cost to train & manage the volunteers. Consider establishing a minimum number of hours to volunteer per month to enhance the benefit to the department. Evaluate methods to train the volunteers rather than using the staff to perform this function, i.e. have a volunteer be a lead trainer.	
9	Continue the current efforts to adjust fees when necessary to cover the cost of the service provided.	
10	Continue on the path of making the adult supportive day care self-supporting.	

No.	Revenue Generation/Cost Reduction Ideas	Page
	<b>Fire</b>	
11	Evaluate the fees we currently charge in the department to ensure our costs are covered by the fee. If they are not, adjust the fee as much as M.G.L. will allow. Evaluate services provided and determine if new fees are appropriate. Ensure our costs are covered for false alarms to encourage residents and businesses to correct the problem that generated the false alarm.	
12	Evaluate the quantity and expertise of people and vehicles that respond to each type of incident, including police, to determine if we could reduce the manpower/vehicle usage while still providing acceptable service. For example, for a medical emergency, is it necessary to have the ambulance, police, EMT and fire truck respond?	
13	Evaluate having common dispatch with the Police Department to determine if the capital investment would be offset by the reduction in dispatchers required.	20
	<b>General Town</b>	
	<b>Consolidation:</b>	
14	Implement collaborative purchasing amongst all municipal and education departments where possible to encourage bulk purchasing to reduce our purchase price.	
15	Centralize building maintenance for all town and school buildings to provide one group responsible for all maintenance related activities. This will allow greater flexibility to place resources where required, focuses one group to evaluate and implement efficiency improvements and may result in a reduction in resources due to improved utilization.	
16	Centralize vehicle maintenance for all town and school vehicles under one organization. This could reduce the cost of our vehicle maintenance due to completing it "in-house" vs. sending some of our vehicles to an outside source for repair, will remove this task from department heads whose expertise is not in vehicle maintenance and place it with an individual that is experienced in this field, will reduce redundant equipment and may result in a reduction of resources due to improved utilization. (See also write-up #49 under the Highway Department).	
17	Centralize the maintenance of all town and school fields under one organization. Benefits of this are similar to those outlined above in centralized vehicle maintenance.	
18	Centralize all municipal and education department accounting/payroll functions under one financial organization. This will improve the efficiency of operations and allow departments to focus on their charters and not be encumbered by accounting, billing etc. functions.	21
19	Evaluate consolidating the Town and School nursing services in an effort to provide a more cost effective service.	
20	Consolidate the Town and School technology function to one group.	
21	Evaluate consolidating pertinent departments, i.e. Police, Fire, Emergency Management and Animal Control into a Public Safety Department and Highway, Parks, Cemetery and Water into a Public Works Department, in an effort to create a more cost effective organization.	
22	Consolidate the human Resource functions for the Town and Schools under one department. This will provide much needed HR support for the schools and improve the efficiency of this function by having it all together.	21

No.	Revenue Generation/Cost Reduction Ideas	Page
	<b>Budgeting:</b>	
23	Create a standard template for budgeting to have total departmental costs/revenues clearly articulated. This will aid in greater understanding of actual departmental operating costs. Implement trend analysis in all departments to aid in decision making.	
24	Modify the budgeting practices of moving funds around to different accounts at the end of the year. This practice eliminates the opportunity to clearly understand actual expenditures in a department.	
25	Evaluate alternatives to our budget process to find ways to reduce the amount of time and the span of time it takes to complete the Town & School budget. Creating a more efficient method will save countless hours for our Town/School employees and Committee volunteers.	
26	Evaluate the feasibility of implementing a capital budgeting system where the funds approved are designated for a particular purchase only and not allocated to the department in general. This will prevent the use of excess funds from a capital expenditure being used on items not approved by the voters.	
27	Evaluate the current system for approval of expenditures by both the Town and School Departments. The focus of this evaluation should be to ensure appropriate control of budgeted expenditures.	
	<b>Other - Revenue Generation</b>	
28	Evaluate sponsorship as a means to generate revenue, i.e. billboards at the fields and advertising on the buses.	
29	Evaluate selling Town or School Services to help others & generate a profit, i.e. do we have excess capacity in our SPED program to bring students in from out of town and charge a fee that is a profit to the town? Do we have nursing services that we could charge for and generate a profit, utilizing our current staff of nurses? Should we implement a day care program at the schools, (pre & post school)?	
30	Centralize & automate conference room booking to make it more convenient for the users to schedule a conference room and free up time for our Town & School employees who currently spend their time booking conference rooms. Evaluate our charges for conference room use & the potential to generate revenue.	
31	Revise our practice of evaluating and applying for grants for both the Town and Schools to ensure that accepting the grant is a good financial decision for the Town in the long term. Applications for grants should include a cost/benefit analysis and management approval.	
32	Evaluate establishing a separate resource for grant writing to aid department heads in applying for more grants, i.e. utilizing an experienced volunteer in this area or hiring an outside firm to research and apply for grants if there were a high assurance that this service would more than pay for itself.	
33	File the appropriate documents to the state to obtain approval to institute an impact fee. If denied, it should be evaluated every year whether or not to file for an approval again.	
	<b>Other - Cost Reduction</b>	
34	Evaluate all conference rooms in the Town & Schools to determine if it makes sense to limit the hours the conference rooms are available to those hours that the building is normally open. In doing so, utility and janitorial costs will be reduced, however it needs to be determined if this reduction is worth the alteration in conference room availability.	
35	Evaluate all town buildings and their locations for efficiency/effectiveness of doing business. Evaluate and address the current space needs, i.e. office & meeting rooms.	

No.	Revenue Generation/Cost Reduction Ideas	Page
36	Evaluate the utilization of our Environmental Engineer & Assistant Engineer to ensure these full time positions are warranted. Evaluate the potential to outsource engineering rather than keeping someone on staff.	23
37	Evaluate our current Town Hall hours to determine if we could reduce our hours of operation to reduce our operating costs while continuing to support our citizens.	
38	Evaluate mailing one excise envelope per household vs. the current practice of mailing one envelope per vehicle.	24
39	Analyze our historical spending on attorney fees (quantity and type) to determine if hiring our own attorney would be cost beneficial to the Town. In addition, in analyzing the type of work we have our Town Council performing, evaluate if there are any system changes we could make that could reduce the number of hours we require this expertise per year.	
	<b>Town Assets:</b>	
40	Evaluate all town/school equipment as a whole to determine if there is opportunity to share equipment, therefore reducing the quantity needed, or to eliminate some of our current equipment. This would reduce maintenance expenses and potentially avoid future capital purchases. Evaluate single vs. multi-purpose type equipment for additional areas to reduce equipment.	
41	Evaluate selling our excess town assets, i.e. old computers, file cabinets, vehicles etc., to generate revenue. Consider using EBay as a source for selling these items as was done in the state of New York.	
42	Evaluate the town cars for hours of use (personal and business), necessity of having a vehicle & the type of vehicle used. Determine if it is financially prudent to continue our current practice with town cars.	25
	<b>Structure/Management:</b>	
43	Evaluate implementation of a financial support group for the schools.	27
44	Evaluate involving the Town's Human Resources Director in ALL town/school negotiations to provide additional expertise in this area and ensure fairness & equitability among all contracts. (The HR Director would not be part of the bargaining team).	
45	Implement a Capital Spending & Utilization Review Committee to review all capital requests, develop a long term capital plan and evaluate the use of our current assets.	
46	Establish a Permanent Town Building Committee that would oversee all new construction rather than setting a new committee for each new building that is required. (Note: This suggestion has been implemented by the Town Manager)	
47	Continue the practice of having the Town Manager approve overtime in all departments to maintain control of this expense item.	
	<b>Highway</b>	
48	Evaluate the hours of operation for improved efficiency, i.e. if we cannot work on the roads during rush hour should we alter our hours?	28
49	Evaluate and implement additional uses for the highway garage upon completion of construction to reduce our expenses, i.e. centralize vehicle fueling and vehicle maintenance.	29
50	Evaluate man-loading, (the quantity, type and utilization of people) for each type of department duty. For example, when paving a road, evaluate the crew that is currently sent out. Are all people highly utilized? Are there changes to our current methods we could implement to improve the efficiency of our operations and reduce the quantity of people required to perform the task?	30
51	Evaluate the utilization of our Engineer & Assistant Engineer to ensure these full time positions are warranted. Evaluate the potential to outsource engineering rather than keeping someone on staff.	31

No.	Revenue Generation/Cost Reduction Ideas	Page
<b>Human Resources</b>		
52	Compare all Municipal/Educator salaries and benefits, including car usage, with the private industry. If necessary, propose adjustments so that the Town of Westford salaries and benefits are comparable to the private sector, i.e. evaluate changing the sick leave benefit of accruing and being paid for all un-used sick time after 5 years.	
53	Evaluate the number of municipal/education employees that work 18.75+ hours and the cost associated with providing retirement benefits to these employees. Is it worthwhile to reduce these part-time employees to fewer than 18.75 hours to save on retirement costs? Compare this retirement benefit to the private sector.	
54	Evaluate the number of municipal/education employees that work 20+ hours and the cost associated with providing health care benefits to these employees. Evaluate what the savings would be if we increased the number of hours worked to receive health care benefits. Compare this benefit to that received in the private sector.	
55	Continually evaluate the unclassified area of expenses to seek ways to reduce our expenditures on these items. Evaluate our expenses/offers in this area to the private sector.	
<b>Library</b>		
56	Evaluate video rentals for the potential to increase revenues while still offering this service at less than the market rate. Analyze the cost of the service vs. the revenue gained. Transfer the cost/revenue of the video rentals back to the library budget vs. the Friends of the Library to accurately reflect the revenue/expenses of the library.	33
57	Evaluate the current hours of operation to determine if we could reduce our hours to reduce expenses and still provide adequate customer service.	
58	Evaluate eliminating one circulation desk to reduce the current expense of manning two circulation desks. For example, could we move a section of the library that requires a person to be present for customer assistance, i.e. reference, to the lower level to provide supervision of the area so the current circulation desk could be eliminated?	
59	Evaluate implementing fines for overdue materials to generate revenue.	37
60	Evaluate the cost effectiveness of the bookmobile. Is the cost of this service justified by its use?	
61	Evaluate implementing a coffee concession area as a possibility to generate revenue for the library.	
62	Pursue endowments to provide revenue for the library.	
63	Evaluate any overlap with our nine school libraries to determine if there is opportunity to share services or materials in an effort to reduce redundancy and costs.	
64	Review the organizational chart to determine if there are opportunities to reduce overhead while still providing an acceptable level of service to the community.	38
<b>Massachusetts Legislation</b>		
65	Modify our current legislation to allow a committee to delegate to one person to sign the warrant for accounts payable vs. the current requirement of a majority of the committee. This will improve the efficiency of completing this task.	
66	Eliminate the state requirement for library certification, i.e. book expenditures/year (15%), and allow the towns to determine what should be spent to maintain an adequate level of service for their customers.	
67	Eliminate the MGL which dictates the number of hours an employee must work to receive health benefits (currently a municipal employee must work 20 hours per week to receive health benefits, industry average is 30-32 hours per week), and allow each town to determine its own benefits and place it within a local bylaw. Change the Middlesex Retirement policy of providing retirement benefits to employees that work a minimum of 18.75 hours (50% of a full time employee) to a level that is more comparable to the private sector. (Current industry average is that an employee must work 30-32 hours/week to be eligible for retirement benefits).	

No.	Revenue Generation/Cost Reduction Ideas	Page
68	Eliminate the prevailing wage requirement to allow towns to obtain more competitive quotes for jobs and pay the market rate vs. a state mandated rate. It is estimated that towns pay approximately 25-33% more in labor costs due to this state law.	
69	Eliminate the requirement to award certain public construction jobs to the contractor which submits the lowest bid, rather than the contractor who is best suited for the job. This will provide more control to the general contractor to choose contractors that he/she feels will complete the job properly, on schedule and on budget. (Filed sub bid requirement)	
70	Implement state guidelines which define what residency is for children attending the schools. This will aid in identifying which district a child should legally be attending.	
71	Modify the MGL on school choice to include that teachers children that attend the school district their parent teaches at can be given priority to fill the school choice slots. This will allow towns to continue to provide the benefit to teachers to allow their children to attend their school, but at the same time collect expenses for those children that are currently attending the schools for "free".	
72	Increase the amount allowed to charge for fees, e.g. Fire Department fees, or remove the cap altogether and let the towns decide what their fees should be. This will allow towns to break even on the costs of providing a service.	
73	Re-instate the old beaver trapping legislation to provide control of the beaver population to help eliminate the growing problems associated with the population explosion, i.e. well contamination, flooding, septic issues etc. The Town currently spends approximately \$20,000 per year to address beaver related problems, which does not include the expenses private citizens incur to address problems on their own property.	
<b>Parks, Recreation &amp; Cemetery</b>		
74	Increase the cemetery rates to cover the majority of our costs of providing the plots.	
75	Continue the trend towards making the Recreation Department an enterprise department.	
76	Place the prioritization, review & approval of building new fields for the entire town under a permanent building committee and/or capital planning committee to allow one group to focus on the Town & School needs and ensure the fields are built to acceptable standards.	
77	Expand the use of "Friends of Westford Recreation" to assist with funding smaller projects.	
78	Evaluate what we charge for all services provided to ensure that we break even on all offerings. The break even analysis should include all overhead, direct and indirect expenses.	
79	Evaluate combining the Recreation Department with the Roudenbush Community Center to reduce any duplication of effort, enhance the economies of scale and gain efficiencies of the operation.	
<b>Permitting, Planning and Conservation</b>		
80	Continue with the current efforts to conduct a full cost analysis on all services provided and propose a fee structure that covers these costs.	
81	Sell map services to the public through the GIS department at a profit.	
82	Attempt to make the Hill Orchard self sufficient in the next contract, i.e. the Town would not pay for some of the operating expenses and the capital improvements.	
83	Evaluate the need to spend at least \$50K for an update to the Town's master plan. Is this really necessary? Since we have the original Master Plan to work off of, can a group of qualified volunteers make the necessary modifications?	
84	Evaluate the progress of implementing the GIS system and determine if the benefits of this system out way the cost after additional progress has been made.	

No.	Revenue Generation/Cost Reduction Ideas	Page
	<b>Police</b>	
	<b>Personnel:</b>	
85	Eliminate traffic supervisors at the schools. (Note: This suggestion has been implemented by the Police Department).	
86	Review the charges & requirements for police details to determine where there is opportunity to reduce this large expense item for the Town. Do we need details at all the sites we currently have them? Are there alternatives to using the police to perform the traffic detail function? Can we use the lower paid officers for this function? Why is our detail rate higher than many of our neighboring towns?	46
87	Evaluate the clerical needs within the department. Can this be reduced? Can automation or changes in practice help to reduce the clerical support required?	
88	Evaluate the upper management structure for the potential to compress it and reduce our overhead expenses.	
	<b>Union Negotiations:</b>	
89	Evaluate adding an option for a full time detail officer as a means to reduce the overtime costs for traffic detail.	
90	Evaluate adding the option to have automatic vehicle locators.	
91	Evaluate adding a mandatory physical requirement for all Police Officers. (A cost analysis of this requirement must be conducted prior to adding it to the contract to ensure it makes financial sense).	
92	Remove (if it is there) the requirement for a Police Officer to perform traffic details	
93	Evaluate 4/2 vs. 5/2 work schedule	
	<b>Revenue Generation:</b>	
94	Evaluate renting the training room for a profit.	48
95	Evaluate leasing the shooting range for classes & training (non-police) for a profit. The cost of leasing the range should be set to more than cover the costs for the range officer, insurance, materials etc.	48
96	Evaluate sharing the cost of the Nashoba Tech officer with neighboring communities. Currently a full time Westford Police Officer resides at Nashoba Tech and Westford pays the entire cost of this position, when it should be shared among all the towns that currently help fund the school.	
	<b>Other:</b>	
97	Evaluate having common dispatch with the Fire Department to determine if the capital investment would be offset by the reduction in dispatchers required.	21
98	Evaluate the quantity and expertise of people and vehicles that respond to each type of incident to determine if we could reduce the manpower/vehicle usage while still providing acceptable service.	
99	Evaluate the quantity and type of responses to house alarm systems. Are there a high number of false alarms? Should we charge for false alarms to encourage the owners to address the issue that caused the false alarm? If a location continually has false alarms, should we not respond unless there is a phone call? The purpose of this is to focus our resources on more important safety functions.	
100	Evaluate the fleet of cars and other vehicles to determine if the benefit of each vehicle out ways the cost of owning it. Determine if reductions are possible to reduce our costs.	
101	Evaluate if modifications to the police building are possible to free up space for other town departments to use that currently do not have sufficient space.	

No.	Revenue Generation/Cost Reduction Ideas	Page
	<b>Schools</b>	
	<b>Revenues/Fees:</b>	
102	Evaluate implementing fees for all non-mandatory services, i.e. instrumental lessons, post school tutoring, etc., to provide the funding necessary to cover the cost of providing this service. This is intended to be a last resort means for obtaining essential funds.	
103	Modify the teachers' contract so fees can be collected for teachers' children from another town that attends Westford schools.	49
104	Evaluate selling Town or School Services to help others & generate a profit, i.e. do we have excess capacity in our SPED program to bring students in from out of town and charge a fee that is a profit to the town? Do we have nursing services that we could charge for and generate a profit, utilizing our current staff of nurses? Should we implement a day care program at the schools, (pre & post school)? (This item is duplicated from the General Town Section)	
105	Reinstate accepting school choice students (students that attend Westford Public Schools but reside in other towns) at grade levels that have excess capacity as a means to bring revenue to the Schools, (the town sending the student to Westford pays a fee for that student to attend the Westford schools).	50
	<b>Class/Program Changes:</b>	
106	Evaluate class sizes for opportunities to reduce staffing with creative class sizing. For example, should we institute variable class sizing, i.e. those subjects that can be adequately taught with a larger class size are and those that require small class sizes are kept small? Should we increase our class sizes for certain grades? Should we implement a minimum class size so we are not conducting optional classes for just a few students? Evaluate offering low attendance classes on alternate years/terms.	56
107	Review eliminating foreign language in 6th grade to help ease the transition to Middle School and potentially reduce the staffing expenses required to teach these courses.	58
108	Review all optional programs for potential to be partially funded by fees or eliminated. Include interscholastic activities.	
109	Eliminate the Technology Specialists (teachers that instruct the students on the computers) at the three K-2 Elementary Schools and have the existing classroom teachers provide this instruction when necessary. This will reduce an ongoing expense at the three K-2 schools.	59
	<b>Personnel:</b>	
110	Evaluate the need for Assistant Principals at each school. (Note: This suggestion has been implemented by the School Department in the '04 budget).	
111	Evaluate the need and use of the extra support staff at the six elementary schools, i.e. Teaching Assistants, Math Tutors & Reading Facilitators. Determine if there are opportunities to reduce some of these positions and still provide the extra assistance to those students that require it.	63
112	Evaluate the use of Math Tutors in grades 3-5 to determine if a reduction in this extra support staff is possible without negatively affecting the education of those students requiring extra support in this area.	65
113	Evaluate the need for Curriculum Coordinators to determine if this overhead position is necessary.	66
114	Evaluate overtime in the schools for possible reduction.	67
115	Evaluate the use of Guidance Counselors, Social Workers & Psychologists in the schools and determine if all the current positions are necessary.	
116	Implement a system to educate employees, i.e. through yearly statements and in their contract, on what their total benefit package is i.e. salary, health benefits, sick time, holidays & vacations, children attend for free etc. Equate this to a 52 week/year employee to help compare the benefits of our school employees to those in the private sector.	

No.	Revenue Generation/Cost Reduction Ideas	Page
117	Increase the use of volunteers in the school system. Examples of where volunteers could be used and potentially reduce spending are as follows: 1. Perform functions that teachers are currently paid a stipend for, 2. Utilize retired teachers to mentor/evaluate new teachers, 3. Use parents to replace some Teaching Assistants, 4. Use High School students to tutor elementary students	
118	Evaluate the MIAA requirement to have a full time athletic trainer on staff for the potential to eliminate this mandate.	
	<b>Buildings:</b>	
119	Evaluate each schools maintenance costs, i.e. electricity, janitorial etc. to industry standards to determine where there are opportunities for efficiency improvements/cost reduction.	69
120	Evaluate the school calendar for ways to decrease building operational costs. For example, conduct professional development days at one school on a Friday or Monday and shut the other schools down to reduce heating and electricity costs.	71
121	Evaluate how our buildings are used in the evenings and determine whether there is an opportunity to limit the number of buildings, or areas within our larger buildings, that are open to minimize our electrical and heating costs.	72
122	Evaluate the best use of the Millennium building for the Town of Westford.	
	<b>Other:</b>	
123	Evaluate the budgeting practices of analyzing school choice assessments vs. revenue to ensure that a complete financial analysis is conducted which evaluates the best grade levels and quantities of students to accept for school choice and includes the full cost of accepting these students.	
124	Evaluate how and where computers are currently used in the schools and look to re-distribute computers if possible rather than purchasing additional systems.	
125	Implement a better system to identify children attending Westford schools that do not have residency in Westford. When a child attends Westford Public Schools but does not live here, the Westford citizens pay for this child's' education without the tax revenue coming in from the child's' family. If we can reduce the number of children that attend our schools but don't live here, we can either reduce our cost or open these currently filled slots to school choice students that the Town of Westford is reimbursed for.	73
126	Institute a system that evaluates and justifies the cost of curriculum choices, i.e. personnel, equipment, textbooks and classroom materials, energy, custodial costs (if offered at night) etc. prior to the purchase and implementation of the new curriculum.	
127	Conduct a cost analysis on all consumable educational books by looking at the utilization rate of the book and the cost of that book. In looking at this data, it should be determined if it is better to copy the materials, not use the book at all, or select a different curriculum, i.e. the math TERC workbooks.	
<b>Solid Waste &amp; Recycling</b>		
128	Evaluate a new disposal program of having the Town pay for one bag of trash per week. If additional bags are needed, residents would need to purchase them at a minimal cost. The intent of this program is to reduce our solid waste disposal (and costs) by increasing the amount of recycling.	

## **Part 4**

### **Individual Commission Reports and Recommendations**

This section contains the summary of findings for those ideas Commission members investigated more thoroughly. They are listed by the idea number and correlate to the number next to the idea on the matrix in the previous sections. Since there is not a summary of findings for each of the ideas in our matrix, it is important for the reader to consider the complete list of ideas in Part 3, in addition to these summaries when looking for cost reduction /revenue generating opportunities for the Town.

***Evaluate Common Dispatch.***

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**Recommendation:** The idea of combined dispatch has its merits as a cost saving mechanism when there is more than one position that can be eliminated. As the Town and police and fire departments grow, there will be a need to revisit the possibility of a combined communications department. Before any new staff are hired for either department, this idea should be looked at in more detail by a committee tasked by the Board of Selectmen to fully understand the impact and cost savings potential of a combined communications department for the Town of Westford.

**Summary of Findings****Pros:**

- Potential Savings by reducing headcount in dispatch function for both Fire and Police

**Cons:**

- Costs associated with moving phone lines, fire alarm panel and other equipment to a central location.
- Training existing staff to handle both fire and police calls
- Difficulty in merging existing staff
- Reporting structure between WFD and WPD

**Financial Analysis:**

1. Cost to move fire equipment=\$300K+
2. New Communications Director=\$15K differential in pay for new employee fully loaded
3. Training costs for existing staff= undetermined
4. Costs savings for one dispatcher=\$40K fully loaded

**Discussion:**

The dispatch of fire and police emergency calls is currently processed by separate groups reporting to the Police and Fire Chief respectively. There is a potential to save staffing costs by having one integrated communications group handling both fire and police calls. Current equipment would be able to handle a combined group but there would be significant costs associated with moving telephone lines and lines directly connected to the center fire station alarm panel. In 1998 the Fire Department reviewed the costs associated with moving their existing communications operations to a new fire station and the quote they received was over \$300K. Four years later and the cost for moving the communications center would certainly be significantly higher than the number from 1998.

During most times of the day there is a maximum of two police dispatchers and one fire dispatcher. During busy times, or when there are significant events that warrant it, more dispatchers are called in to help. During evenings and slower times of the day there is only one police dispatcher and one fire dispatcher. With the staffing at this level it would be very hard to save significant money by combining dispatch groups. There will always be a need to have two dispatchers working at the same time.

There is the potential to reduce one position during the day, but any new communications department will have to be managed by a supervisor or director position that does not currently exist. The costs associated with the new position and costs associated with the equipment move make this change a non financial gain for the Town at this time.

*Evaluate centralization of accounting/payroll functions and Human Resources.*

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**Recommendations:** Refer to Summary of Findings

**Summary of Findings**

**1. Current Situation - Accounts Payable and Payroll Process**

Currently the Town Departments and the School Department are running identical but independent Munis software packages for Payroll/Personnel, Purchasing and Accounts Payable on the same server. Since the school AP and Payroll are separate, they must be reconciled and then provided to the Town Accountant who makes the journal entries to the General Ledger.

**Opportunity for Efficiency** – combining the programs would eliminate the reconciliation activity on the school side and make more time available for budget analysis/monitoring.  
**Implementation Requirements** – implementation of a joint chart of accounts.

**2. Current Situation – Chart of Accounts**

Town and School Departments use a separate Charts of Accounts.

**Opportunity for Efficiency** - The Town should develop a combined chart of accounts for Town /school departments. A uniform classification of receipts and expenditures would provide an opportunity to understand how much is spent on categories of items and provide uniform budgeting.

**Implementation Requirements** - This combined chart must accommodate end of year financial reporting to both the Department of Revenue (Schedule A Report) and the Department of Education (Schedule I & 19 etc.).

**3. Current Situation - Decentralized Batch Processing with De-centralized Warrant and Check Generation at Town Hall**

Currently the Town and Schools each process separate warrants and generate checks for accounts payable, purchasing, and payroll. Since all checks require the signature of the Town Treasurer, the school checks must be brought to Town Hall for signature processing.

**Opportunity for Efficiency** – There are two opportunities for efficiency both options depend of a combined chart of accounts. The combined chart would allow the school department to continue to process separate Munis batches for payroll and accounts payable as do all other Town departments. These batches would be submitted to the School Committee for their approval. The Town Accountant would then pull in all Town and school batches for the generation of one combined warrant. The Town Accountant and the Town Manager would approve the warrant. All checks would be generated at Town Hall. Under this scenario, all Town departments and the school department would maintain their identity as separate departments. Labor savings would be realized by a central processing of the warrant and checks.

A second opportunity for efficiency would combine Town/School payroll and AP in a shared type of service. Bills and payroll time sheets would still be approved by the individual schools and forwarded to Central Office for approval. The approved bills and payroll would then be forwarded to a shared AP/Payroll department for processing, and warrant/check generation.

#### **4. Combined Human Resources Department**

Since a large number of Town Employees work under the School Department, the Town should look at a combined Town/School Human Resource Department. This department would be responsible for employee recruitment and orientation, benefits administration, tracking professional development, employee reporting, contract negotiations, and contract oversight. The Town should also consider the purchase of Munis Applicant Tracking Software.

#### **5. Current Situation - Utility Billing**

The Water Department uses a separate software package for the billing and collection of water revenue. The Town Accountant must make journal entries to record Commitments and Abatements to the General Ledger. The Water Department processes receipt batches using the Munis software package. The batches are forwarded to the Accounting Department for posting to the General Ledger.

**Opportunity for Efficiency** - The Town should explore the feasibility of centralized water billing and collection functions in the Finance Department with the use of the Munis Utility Billing Software. This centralized billing and collection function would allow for posting directly to the General Ledger and would greatly improve the accounts receivable reconciliation process, thereby saving time.

#### **6. Current Situation – Tax/Fee Collection**

The Town currently collects real estate, personal property, and motor vehicle excise through the Tax Collector's Office. In addition to tax collection, each department of the Town is responsible for the collection of departmental receipts such as licenses and permits, fees, and miscellaneous departmental receipts. These receipts are then turned over to the Town Treasurer.

**Opportunity for Efficiency** - The Town should look into the creation of a Town Collector position. This would allow for the centralized billing and collection of all revenues including taxes, excise, water revenue and departmental receipts in the Finance Department. A centralized tax/fee office would eliminate the reconciliation effort at various departments.

***Outsource Environmental Engineering Services.***

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**Recommendation:** A change in the method of producing environmental engineering for the Board of Health is not recommended. The work load of the sanitary engineer and the food inspector should be analyzed on regular basis to see if a drop in Board of Health activities might allow a reduction in staffing level or hours of work, however, the nature of the work is an essential government service. The present system has built in checks and balances in that the inspectors have direct supervision and the citizen Board of Health directly oversees their supervisor. A change in this structure to privatized services would require a new oversight structure in order to create today's level of safe guards.

**Summary of Findings****Discussion:**

The town's director of environmental services works directly under the authority and control of the Board of Health. The job entails septic permitting and inspection, private well permitting, food service permitting and inspection and a myriad of other tasks directly related to public health and its public safety implications. The director has a sanitary engineer assistant and a food inspector assistant working under his direct supervision. Outsourcing creates a set of problems similar to outsourcing Town Engineering services.

**Pros:**

- Allows the Town to tailor engineering work directly to task specific work
- Allows the Town to hire direct expertise to handle specific tasks rather than relying on the more generalized talent of the Town Environmental Engineer.

**Cons:**

- Requires staff to create scopes of work, administer the work, and check the work. The potential for fraud escalates exponentially. The value of a piece of land can increase ten fold based on successful septic perking and private well permitting. The Town would require direct supervision of outsourced environmental inspections and permitting for both septic and wells. The same logic applies to food inspection.
- While specific tasks are covered, the Town's ability to quickly respond to engineering problems and to do day in and day out tasks associated with board of health needs is severely limited.

**Financial Analysis:**

Savings are possible by eliminating the septic inspector and the food inspector and relying on a single environmental engineer who would hire out services only when needed. The Board of Health, like the Planning Board works under a fee for services requirement. Savings would accrue to applicants and not to the general fund.

*Investigate citizen suggestion to save postage by mailing multiple excise tax bills in one envelope.*

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**Recommendation:** Maintain the existing tax billing system. The potential savings will be more than offset by increase staff time resources to deal with missing bills.

### **Summary of Findings**

**Description:** Westford mails the bulk of excise tax bills in the Spring. There were 17,777 bills mailed in the Spring, many bills were sent to the same household. A smaller mailing in the summer was sent to 1,276 residents. A program was written to calculate the number of vehicles sent to the same owner of record. This information was then used to calculate the potential savings. (See Attachment A)

Background: At most four bills can be included in each envelope and the vendor who stuffs the envelopes charges an additional .04 cents for each additional bill placed in one envelope. Based on the two mailings this year, the estimated savings would be \$1,442.75.

**Pros:**

- Improved citizen perception that tax dollars are being used wisely.

**Cons:**

- Increased risk that resident will not receive bill in a timely fashion. If single envelopes are mailed with multiple bills and that envelope is lost in the mail, the owner will be responsible for the late fees associated with all the missing bills. Citizens who must pay late fees spend more time with Town Hall staff attempting to get the fine waived.

*Evaluate the need to supply Town vehicles for employees who conduct Town business, specifically evaluate the cost effectiveness of reimbursing employees for their Town-related travel versus supplying a Town vehicle for their use in both conducting their work and for their personal work travel. Employees were asked to complete the Westford Vehicle Tracking Information to help us evaluate vehicle costs.*

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**Recommendation:** Based on our findings, the Town would save at least \$7,000 dollars by providing mileage reimbursement for employees vs. supplying Town-owned vehicles for their use (note: Police and School vehicles are not included in this calculation). This amount was calculated using very conservative estimates (see the following Addendum). The estimate does not include the lost revenue from the sale of the vehicle or vehicle depreciation expense. On the con side, it also does not include the costs associated with processing mileage reimbursement to employees.

### Summary of Findings

#### **Discussion:**

During the past several years, the number of Town-owned vehicles has increased as well as the number of employees who also use these vehicles to commute to and from work. The majority of these vehicles are retired police cars that have been recycled for Town use. The tax code stipulates that use of a town-owned vehicle for personal use is a benefit and must be included on the employee's W4. This has not been done to date. Personal vehicles used by two groups (schools and police) have not been included in this calculation.

Schools -Several years ago Westford Public Schools purchased their own fleet of Special Education (SpEd) Vans to transport students needing special services to Westford Public Schools and to transport SpEd students who are enrolled in placements outside the district. The school department has estimated that this investment has saved over \$1M to date. As an incentive to find drivers for those vans, the school department provides 100 miles of van use per week free to each driver.

Police -The police department maintains several unmarked cars for investigative work. Specific information about mileage for personal use was not made available.

#### **Addendum - Spreadsheet Explanation**

A description for the calculations used to arrive at the \$7K figure follows:

- Net Mileage – total yearly mileage less personal mileage. Personal mileage was calculated by multiplying the work/home round trip by 47 weeks to allow vacation, holiday and sick time.
- Maintenance – Average price used in calculation, for example if a Maintenance costs were estimated as \$500 - \$1,000, the mid-point was used in the calculation.
- Gas for Business - Total Mileage divided by 15 MPG (web quoted mileage for Crown Victoria) times \$1.60.
- Total Cost for the Town - This is a summation of the Maintenance, Insurance and Gas.
- Cost if Reimburse -This is the cost to the Town if it reimbursed employees for business mileage only. The rate is calculated at .36 cents.



*Evaluate implementation of a financial support group for the schools.*

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**Recommendation:** We recommend implementing the Financial Support Committee for the Schools.

**Summary of Findings**

**Description:** Currently, the Finance Committee is not heavily involved in the initial budget process for the schools. It receives the completed budget and focuses most of its attention to the change from the prior year. At this point in the process, it is difficult to understand all the details behind the budget numbers, therefore making it difficult for the Finance Committee to play an active role in providing feedback and support on the entire school budget.

Being that the school budget is by far the largest budget in the town and the one that has the most impact on our taxpayers, the Commission for Efficient Town Government recommends the establishment of a financial support committee for the schools. This group would be a sub-committee of the Finance Committee. The membership of this committee would be comprised of the following individuals:

Finance Committee Members - 2  
School Committee Member - 1  
Board of Selectmen Member – 1  
Assistant Superintendent of Business and Finance  
Superintendent of Schools

It is the role of this committee to be actively involved throughout the entire budget process with the schools – the end goal being a well educated group that understands all the justifications behind the financial requests for the given year that can intelligently provide feedback and support for the school budget.

**Pros:**

- This committee will provide an outside perspective to various budget requests and may offer creative solutions to resolving our budget issues.
- This committee will provide additional financial expertise to the schools.
- Assuming agreement at the end of the budget process, this “non-school” committee will be able to provide support for the school budget by means of outwardly showing their support and by having the ability to intelligently answer questions of the public on the school budget.
- Due to increased knowledge and early involvement in the budget process, this committee may be able to help reduce the time dedicated to the budgets, thus allowing our School Committee and Administrators more time to work on educational projects, vs. the yearly budget.

**Cons:**

- This will require additional meetings for the members to attend.

*Evaluate hours of operation for improved efficiency.*

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**Recommendation:** After considering the existing town bylaw regulating construction and the potential cost implications of equipment and overtime labor, no changes to the hours of operation are advised at this time.

### **Summary of Findings**

#### **Current Situation – Hours of Operation**

Standard operating hours for the department are 7:00 till 3:30. Winter hours deviate from the standard for event driven hours that run 24 hours straight until the snow or ice condition is made safe. Line painting operations are done at night in order to avoid traffic tie-ups. Major jobs concerning road rebuilding, repaving and drainage work are often extended by overtime in order to reduce setup and tear down costs and to complete projects that would reduce traffic interference.

**Opportunity for Efficiency** – The present schedule limits work on main commuting routes from 9:00 till 3:00 due to traffic management and commute disruption. Moving the construction to off ours could reduce costs due to longer work periods and reduced traffic interference similar to operations on interstates. Presently the highway department works on smaller projects and back road projects to fill the start of the day and relocates to commuter roads at 9:00.

**Implementation Requirements** – Implementation will entail purchase of new equipment for night lighting, training for night operations, renegotiation of the highway workers contract, modification of Town construction hour's bylaw to allow night operations (presently 7:00 A.M. to 7:30 P.M) and developing consensus of town's people to abide construction noise at night in their neighborhoods. The night pay differential of approximately 20% works out to a 60 minute gain in productivity since the 5 ½ (lunch ½ hour removed) hour window at 100% of labor cost equals 6 7/8 hours at 120% of labor costs for night operations. This assumes that the present operations do not fully capture the rush hour downtime in productive work. This does not appear to be true such that the true measure of increased efficiency can only be established by a time and motion study to determine present utilization in the 7:00 to 9:00 commuter downtime. The gains seem so small as to obviate the investment and political work necessary to implement the change especially when coupled with the degradation of living conditions in the town due to the change.

The second possibility is a split day starting at 9:00 running to a long lunch break at 1:00 and resuming after 6:00 till 10:00 P.M. All of the above conditions must be met but productivity gains are increased due to the presumed lower premium for split work as contrasted to night work. The gains seem too small to recommend implementation.

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*Evaluate and implement additional uses for the highway garage upon completion of construction.*

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**Recommendation:** Following completion of the new highway garage, we recommend the town centralize vehicle maintenance, vehicle fueling and building maintenance at that one facility.

### **Summary of Findings**

**Current Situation – New Highway Garage** – The new highway garage is under construction with the final cost as yet unknown but predicted to be approximately \$10,000,000. The new garage will cost more to operate than the current garage due to increased size. The improved efficiency of the new facility should mitigate this increase.

**Opportunity for Efficiency** – The new garage offers savings in fueling and maintenance costs to the town. 2003 costs for fuel for all departments equaled \$128,000 without including grounds maintenance, schools or senior van fuel costs. Vehicle Maintenance costs equaled approximately \$78,000 not including parks and recreation or school costs.

Centralizing fuel and maintenance at the highway department will reduce costs by an uncertain amount. The fuel is presently bid out for a wholesale plus fixed price increases per gallon. Central fueling would eliminate the markup. Using card reader access to fuel would track each piece of equipment separately for fuel usage, efficiency and timing of preventative maintenance.

Central maintenance would also result in costs savings due to the use of town mechanics rather than private mechanics. Fire equipment maintenance costs would not be reduced significantly due to the requirement to use certified fire equipment mechanics (presently handled by fire department). Routine maintenance, including oil changes and tire changing could be done at the new facility.

The size of the new facility allows for storage of all equipment inside. This should result in savings due to extended equipment life, reduced maintenance costs (especially hydraulic hoses and painting), reduced vandalism, and recovered on road time for personnel (easier startup). The wash bay is also expected to increase equipment life. The exact amount of savings to be realized is difficult to estimate. Preliminary estimates indicate an increase from 15 to 20 years on average for large equipment. This 33% increase if realized could reduce capital investment by approximately 25%. Not all of this would result in savings as maintenance costs would increase in the final years due to extended mileage and wear.

The new garage has room for a carpentry shop (no equipment purchase is contemplated at this time). The use of the facility for centralized building maintenance is an opportunity for efficiency and reduction of outsourced work. This is especially true if the school department can be included in centralized building maintenance.

**Implementation Requirements** – Fueling would be self-service while the present situation is not. Contract modifications may be required for this new labor “item”. Agreements to use the facility by all town departments including the schools would be required.

*Evaluate man-loading for department duties.*

---

**Recommendations:** No changes to man-loading recommended at this time. The department head should continuously look for opportunities to improve efficiency of the crews sent out for possible reductions in the number of employees needed for a particular type of work.

### **Summary of Findings**

**Current Situation - Man-Loading** - The Highway garage functions with two fewer road maintenance personnel than they did in the early 1980's while the town has grown adding increased miles of road and numerous new drainage structures. Highway now does its own catch basin and manhole servicing rather than outsourcing. The structure includes two 5-man crews with supervisors.

The only increase in personnel occurs in administration with the addition of an assistant superintendent and an office manager over the manpower of the 1980's. The increase in federally and state mandated paper work (especially environmental) and the requirements for notification and planning required for work near wetlands and concerning drainage explain this increase. The assistant highway superintendent is filing for early retirement but is needed full time to manage the highway garage construction project.

**Opportunity for Efficiency** – For a modern organization the highway garage has a fairly flat organizational chart. The snow plowing requirements really drive the man power needs more than maintenance. Centralizing new functions at the garage with the increase of man power necessary would increase the efficiency of administration while also improving the chronic shortage of snow plow operators.

**Implementation Requirements** – Increase of highway budget at the expense of other budgets in order to move certain labor functions under highway administration. May require union negotiations due to lateral moves and pay differentials between differing bargaining units.

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***Outsource Town Engineering Services.***

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**Recommendation:**

A change in the method of producing engineering for the Town and the Planning Board is not recommended. The work load of the Town Engineer and assistant should be analyzed on regular basis to see if a drop in future planning board activities might allow a reduction in staffing level or hours of work.

**Summary of Findings****Discussion:**

The original intent of Town Meeting in creating the Town Engineer position was to cover the costs 50% for Highway and 50% for Planning Board via fees. State law requires use of planning board fees only to cover the cost of planning board operations. This revenue neutral condition means in essence that any revenue saved by outsourcing engineering would not be realized as additional town revenue. In fact the operation today involves the Town Engineer in planning board activities approximately 70% of the time and 30% highway. If, in fact, the Town Engineers time of approximately 30 hours per week were outsourced and could be accomplished in the same 30 hours it would cost approximately \$132,600 assuming an hourly engineering cost of \$85 per hour (on the low end of the range for on call civil engineering costs) while the Town Engineer would cost approximately \$55,000 (fully loaded rate except overhead for office space and utilities). Since this is a revenue neutral proposition, the costs must be attributable to direct services and covered by fees, in neither case does the general fund benefit from the cost differential.

The 30% of Town Engineer time utilized on non-fee based activities could result in a savings but only if the services are not actually required. The cost of outsourced engineering is approximately \$85 per hour versus approximately \$38 plus overhead for space and utilities at the highway garage. The investigation so far indicates that the Town Engineer and his assistant are both utilized to the maximum with the highway garage outsourcing some specialized work now.

Unfortunately the Planning Board needs much of the Town Engineer's time at the end of development cycles. We are seeing this now with the bankruptcy of the Rome Drive developer and the failures of the project at Chestnut Hill. Both subdivisions require a lot of analysis and remedial engineering to correct defects and to finish the systems to a degree acceptable to the Town. The fees covering these costs were collected years ago and deposited in the General fund as revenue and are no longer available to cover today's expenditures. This results in a dedication of today's fees to cover yesterday's projects.

**Pros:**

- Allows the Town to tailor engineering work directly to task specific work
- Allows the Town to hire direct expertise to handle specific tasks rather than relying on the more generalized talent of the Town Engineer.

**Cons:**

- Requires staff to create scopes of work, administer the work, and check the work
- While specific tasks are covered, the Town's ability to quickly respond to engineering problems and to do day in and day out tasks associated with highway and planning operations is severely limited.
- Cost savings are not apparent. The hiring of outsourced engineering to apply to subdivision problems from yesterday's developments is not covered by fees and would have to come out of the general fund at significantly higher rates. .
- Highway department engineering costs which have no fee based requirements would increase significantly and be payable directly out of the general fund.

**Financial Analysis:**

Savings are in the future only when direct billing of planning board applicants for all engineering review is reinstituted. In the interim increased costs must be covered from the general fund.

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*Evaluate video rentals for the opportunities to increase revenues. Two ideas were investigated. First, increase the cost of renting videos from \$1.00 to \$1.50. The cost of renting a video has been \$1.00 since videos were first introduced in 1984. The second revenue generation idea is to introduce a two-tier rental cost system for newly released videos. These videos/CDs would be rented at a higher fee with a shorter rental time.*

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**Recommendation:** Both the price increase and two-tier video suggestions provide income-potential for the Library while continuing to provide patrons with a valuable and cost-effective service (unlike assessing fees for over-due books). It is therefore recommended that the Library adopt one of these revenue-generating ideas.

### Summary of Findings

#### **Discussion:**

**Increase Rental Charge:** The video collection is donated by the Friends of Fletcher Library. The Fletcher Library staff collects the video fees and returns the revenue to the Friends who then donate the funds to the library. FY'03 circulation statistics.

Adult videocassettes	29,574
Children's Videocassettes	21,403
Total Rental FY03	\$50,977

Currently all videos are rented for \$1.00 per week with no late charges. Late charges were eliminated in the mid 90's. Increasing the cost to \$1.50 per week may suppress circulation but even with a very conservative circulation decrease of 25%, the income should increase by 12.5%. Even with an increase of .50, the rental cost would still be significantly less than the cost of the major chains.

**Introduce Two-tier Rental System for New Releases:** The present rental fee is the same for all movies, introducing a second tier for new releases would generate more revenue; the rental fee would be higher and the rental period shorter just as it is at video chains. This pricing would maximize revenue for the 6-month period when a video is classified as a new-release. Since the ability to charge a higher rental fee would be limited to 6-month period, patrons would need to be charged a fee for holding a video beyond the rental period. The shorter rental period and late fee structure would ensure that more residents were able to rent the newly released movie. After the 6-month period, the movie would revert to the standard pricing system.

The cost calculations do include the cost of purchasing the video. This would enable the library to collect the rental income and deposit it into the general fund. Those monies could then be used to offset the cost of library operations.

**Pros:**

- Enhanced revenue that is still well below the fees charged by major video chains.
- Newly released videos would enjoy wider circulation because the shorter rental time would ensure wider distribution.
- Rental income from videos would be returned to the Town to be used as a direct offset for operating costs.

**Cons:**

- The 50% increase in rental cost will be unpopular with residents.
- The two-tier system will introduce more handling requirements as videos/CSs are turned over more frequently and staff will need to contact patrons for overdue materials.

<b>Increase Cost of Rentals</b>			
		<b>Increase Cost by .50</b>	
	<b>FY'03</b>	<b>Circ. Same</b>	<b>Circ 25% less</b>
Adult videocassettes	29,574	44,361	33,271
Children's Videocassettes	21,403	32,105	24,078
<b>Total Rental FY03*</b>	<b>\$50,977</b>	<b>\$76,466</b>	<b>\$57,349</b>

*\*Note that rental income does not include labor costs or the cost of the videos. (Videos are donated from the Friends of the Fletcher Library.)*

<b>Second Tier of Video Rentals*</b>		
	<b>135% Less</b>	<b>108% Less</b>
Level 1 movie	\$2.00	\$2.25
26 weeks @ 2 rents each week	104.00	117.00
Minus cost of movie \$18.00	18.00	18.00
	\$86	\$99
Six month income for 100 Level 1 movies	\$8,600	\$9,900
<b>Yearly Income for 100 movies**</b>	<b>\$17,200</b>	<b>\$19,800</b>

\* Reference retail cost for a 2 day rental at Blockbuster is \$4.69

\*\* Note that the rental income *does* include the cost of the video but not labor costs for processing.

**Attachment:** Response letter from Ellen Rainville, dated May 20, 2004

Ms. Nancy Rosinski, Chair  
Commission for Efficient Town Government  
13 North Hill Rd.  
Westford MA 01886

May 20, 2004

## RE: LIBRARY DEPARTMENT DATA ANALYSES

Dear Ms. Rosinski,

Thank you for sharing via the library liaison Ms. Margaret Murray data regarding additional Revenue Generation at the J. V. Fletcher Library. I appreciate the opportunity to address the proposal of an increase in video rental income and to forward information that will assist the Commission in refining its findings and recommendations:

### INCOME FIGURE DISCREPANCIES

- Please note that actual income for CY2003 (calendar year 2003) from the video rentals was \$43,270 for 49,181 circulations (the Friends of the J. V. Fletcher Library, Inc. run on a calendar fiscal year). The CETG projections that assume \$1.00 of revenue for each circulation are higher than the actual income realized because we are not allowed by the Massachusetts Board of Library Commissioners (MBLC) to charge fees for federal grant-funded videos.

### HIDDEN COSTS

- The two-tiered rental system involves additional staff processing time and labor: all items must be entered as bestsellers then (after six months) changed back from bestseller status – this involves changing the database record, the circulation parameters and the physical container for each video title. A new cost would be the purchasing of “3-DAY LOAN” stickers for all new titles to be attached then removed after the six months elapse. N. B. The library Fine Arts Department USED to have a bestseller video collection but abandoned the two-tier circulation period as too expensive and labor-intensive. Finally, while the CETG sees “dollar signs” associated with this recommendation, I see the staff making daily trips to the bank for quarter rolls so they can make change for the 150 circulations per diem as the public pays with dollar (and higher) bills.
- A shortened circulation period will result in increased overdue notifications despite FY05 cuts in staff and a major reduction in the postage line item; this increase means staff sorting, checking and validating more overdue notices, recall notices, and email bump-backs where email addresses are utilized. Additionally, expenses will be incurred for purchasing envelopes, stuffing the envelopes and affixing postage where mailing of notices is required.

### FEES AND FINES

- The bestseller “late fee” is in actuality a fine, and if CETG accepts that fines are not cost-effective then this late fee should not be recommended; as noted previously, the true revenue from fines must be assessed against the cost in staff labor to collect, record and deposit late fines as well as argue extensively with patrons who pay fines on no other collection.

### 501 C 3 REVENUES

- Is the CETG recommending that all revenues from auxiliary 501 C 3 corporations (i.e. the Friends of the J. V. Fletcher Library, Inc.) be channeled as gifts into the General Fund, or turned into Revolving Accounts, and used to offset departmental operating budgets? (e. g. will WestNet also lose funds and/or other auxiliary groups whose Articles of Organization involve auxiliary support and fund raising for town institutions?)

### COMMERCIAL VS. PUBLIC LIBRARY COMPARISON

- The video rental recommendation compares the J. V. Fletcher Library to commercial rental video chains whereas we should be compared to other public libraries in the Merrimack Valley. In the

Merrimack Valley Library Consortium (MVLC), only 5 out of 36 members' charge fees for videos and these five are in danger of losing reciprocal borrowing privileges unless fees are abandoned or rental collections shared with non-fee-charging libraries. Currently, 2 of the 5 are conducting pilot experiments that allow their rental collections to be requested by other libraries for free. While the CETG is advocating a higher fee in the anticipation of increased revenue, all other professional and service pressures are advocating NO fees and free access. Additionally, market forces and new formats are depressing circulation activity as more households choose on-demand and other cable products, and as we attempt to maintain both VHS and DVD formats for video titles. This fiscal year's circulation is 8% lower than the same period in FY03, so income anticipation should be deflated accordingly.

#### STATE AID AND STATE CERTIFICATION IMPACTED

- Were video fee revenues to become an offset, or become a Revolving Account, the Town would then need to make up at least \$28,000 in Books and Materials (in FY05) currently contributed by the Friends out of this revenue and currently recognized as a contribution towards the 15% book expenditure mandated by the state. The Town appropriation for the library is currently inadequate in FY05 to reach the Municipal Appropriation Requirement, and ensure the certification of the J. V. Fletcher Library. Depending upon performance increases distributed from the compensation reserve, the May Town Meeting appropriation will be short by \$5,000-\$10,000. The Library will need to apply for one of the limited number of waivers granted by the MBLC and appear before the Commissioners to explain and defend the FY05 budget process in order to remain state-certified, and eligible for grant monies, inter-library loan privileges and statewide library use by residents. In this process, the Town of Westford will be competing with other municipalities for a fixed number of waivers and for the most horrific budget story. While the CETG projects a minimal income of \$57,000 from this proposal, the \$28,000 materials expenditure currently contributed by the Friends would need to be added to the Town's appropriation. At a projected 8% reduction in circulation, the net gain would equal \$24,440.

#### DATA PARITY CONCERNS FOR CONSIDERATION

- It is hoped that the CETG will convert its data to compare the "non-custodial FTE" as provided by the MBLC, per the concerns recorded after the initial response to the statistics on FTE's and activity. Using this figure provided by the MBLC will eradicate any discrepancies in comparing libraries with or without maintenance staff. Comparisons that neither increase our hours, nor conversely reduce our FTE's by backing out custodial staff results in data comparisons that are not a fully accurate as they might be.

I wish to thank the Commission for Efficient Town Government for the opportunity to provide further background on its findings, and I would be happy to provide further material or data as needed.

Very Truly Yours,

Ellen D. Rainville, Director

Cc: Ms. Margaret Murray, Library Liaison  
Board of Library Trustees

/edr

*Evaluate implementing fines for overdue books and materials.*

**Recommendation:** Implementation of fines is not recommended at this time because the potential revenue is not sufficient to warrant the change.

**Summary of Findings****Discussion:**

Westford's library has maintained "fine free" system since 1971. Several area towns generate fine revenue ranging from \$1,800 to \$87,000 (see Fine Circulation Survey below generated by J.V. Fletcher Library). Given that fines would be a percentage of the total circulation, the potential revenue was evaluated using an average of the next lower and higher four towns closest to Westford in circulation. Using the more similar circulation figures adjusts the fine income average from \$16,734 to \$15,038.

<b>Town</b>	<b>1998 Popul.</b>	<b>Circulation</b>	<b>Fine Income</b>
Bedford	13676	221,734	28,000
Westwood	12935	236,000	15,000
Burlington	23493	236,228	2,500
Billerica	38861	254,000	16,000
Sudbury	15130	274,000	15,000
Reading	22956	325,000	2,000
Acton	18851	325,016	1,800
Concord	17792	325,330	40,000
<b>Average</b>			<b>\$15,038</b>

The costs associated with implementing fines are \$219 in one-time supplies (cash boxes, change sorter, etc) and \$17,307 in labor costs for collection, recording and set-up for three library work areas. If fine collection areas were reduced from three workstations to two the labor costs could be reduced to \$11,596.

Potential Income	\$15,038
Labor costs	-11,596
Set-up	-219
<b>Revised Revenue</b>	<b>\$ 3,223</b>

**Pro:**

- The fine income would provide a constant revenue stream to fund library operations.
- Patrons would be more likely to return books on time allowing other patrons access to materials.
- Fine revenue would likely increase as circulation increased.

**Con:**

- May discourage patrons from using library services.
- May create a negative atmosphere as staff is forced to collect fines.
- May result in greater loss of materials.

**Attachment:** Response letter from Ellen Rainville, dated February 19, 2004 (see after Idea no. 64)

*Evaluate the organization chart to identify additional possibilities for reduction.*

**Recommendation:** The library director has indicated that an early retirement is slated for 12/31/03 (16 hr per week position). There appears to be a wide variety in the staffing levels of libraries for populations, total hours open and circulation levels similar to Westford. It is recommended that further research be conducted to understand how service and programs vary in relation to staffing.

### Summary of Findings

#### **Discussion:**

Data from the Massachusetts Board of Library Commissioners was used to calculate two ratios to evaluate staffing levels. The search was conducted for communities in the Metrowest and Northeast regions with a population of 15,000 to 24,999 and with the kind of community classification as Economic Dev. Suburb and Residential Suburb. Currently the Fletcher Library was the only entry in the 15,000-24,900 sized Residential Suburb. No Libraries were classified as Growth Communities. Due to the limited number of libraries in our region, we expanded the comparison to include two regions. One ratio calculated the total number of hours open number per full-time equivalents (FTE). The second ratio calculated and total number of circulation activity, including interlibrary loans, per FTE.

#### **Total Library Hours Per FTE**

The total library hours were divided by the number of FTEs, the higher the ratio, the fewer number of staff per hour. Sudbury had the lowest staffing level per hours opened with 12.8 FTE for 3,100 hours; Natick had the highest level with 29 FTE for 3,177 hours.

	<b>Hrs/FTE Ratio</b>	<b>FTE</b>	<b>Hrs</b>
<b>Subury</b>	242	12.8	3,100
<b>Dedham</b>	233	21.6	5,042
<b>Stoneham</b>	217	13.4	2,910
<b>Concord</b>	195	29.6	5,782
<b>Belmont</b>	190	26.6	5,056
<b>Wilmington</b>	182	17.1	3,120
<b>Acton</b>	178	18.1	3,228
<b>Burlington</b>	175	17.1	3,001
<b>Reading</b>	155	18.5	2,862
<b>Wakefield</b>	149	21.6	3,222
<b>Marblehead</b>	144	19.8	2,857
<b>Westford</b>	141	23.8	3,348
<b>Winchester</b>	135	22.9	3,087
<b>Natick</b>	110	29.0	3,177

### **Total Circulation Activity Per FTE**

The total number of circulation was divided by the number of FTEs, the higher the ratio, the fewer number of staff handling circulation. Sudbury had the lowest staffing/circulation ratio with 12.8 FTE supporting a circulation of 271,977. Dedham had the highest level with 21.6 staff supporting a circulation of 120,615.

	Circ/FTE Ratio	FTE	Circulation
<b>Sudbury</b>	21,248	12.8	271,977
<b>Acton</b>	20,231	18.1	366,183
<b>Winchester</b>	19,755	22.9	452,389
<b>Reading</b>	18,591	18.5	343,930
<b>Belmont</b>	18,258	26.6	485,650
<b>Natick</b>	18,253	29.0	529,331
<b>Burlington</b>	15,486	17.1	264,808
<b>Wakefield</b>	13,608	21.6	293,939
<b>Concord</b>	11,727	29.6	347,126
<b>Marblehead</b>	11,608	19.8	229,841
<b>Westford</b>	11,601	23.8	276,110
<b>Wilmington</b>	11,506	17.1	196,759
<b>Stoneham</b>	9,326	13.4	124,968
<b>Dedham</b>	5,584	21.6	120,615

**Attachment:** Response letter from Ellen Rainville, dated February 19, 2004

Ms. Nancy Rosinski, Chair  
Commission for Efficient Town Government  
13 North Hill Rd.  
Westford MA 01886

February 19, 2004

**RE: LIBRARY DEPARTMENT DATA ANALYSES**

Dear Ms. Rosinski,

Thank you for sharing via liaison Ms. Margaret Murray the preliminary data regarding staffing levels, circulation and fine assessment at the J. V. Fletcher Library. I appreciate the opportunity to qualify further the data you have collected, and to forward information that will assist the Commission in refining its findings and recommendations.

**Idea No. L10 - Total Library Hours per FTE:**

The Commission forwarded a table compiled from data from the Massachusetts Board of Library Commissioners (MBLC) calculating total library hours per year and full-time equivalents (FTE's) needed to staff the facility for those hours. I would like to address the following factors that contribute to discrepancies in the number of FTE's and that impact the HOURS computation:

- Please note that the FTE total for Sudbury – the library with the highest “Hrs/FTE Ratio” -- reflects no custodial staff. A cleaning service is paid for 40/HPW and the Director does Maintenance and/or vends out this need. The low FTE also reflects design efficiencies of the new building (N. B. the 1970 addition was demolished and replaced with the newer square footage that requires less monitoring). Conversely, Westford kept its 1969 addition and supports a less efficient building design (a basic “H”). Similarly the Reading Public Library pays for no custodial, facility maintenance, utility or janitorial supply costs; all of these costs and labor are subsumed under the Public Works Department. This both eliminates custodial staffing within that library's FTE and lowers the library “municipal appropriation” as collected by the MBLC.
- Westford must report its evening custodial staff under FTE, but *cannot* report **416** hours of late night meeting coverage under HOURS OPEN according to MBLC instructions because the entire library is not open. If these hours were included in the Westford total, the “Hrs/FTE Ratio” would increase to 158, placing Westford closer to the middle of the pack.
- Anecdotally, the Sudbury Director reports that his facility allows him to staff with as few as 2 staff – a level that I would argue unsafe for the Westford facility, the staff and the public. If asked, I could produce the multiple Incident and Injury Report forms for the past year to support this argument.
- Please note that the following libraries possess one or more Branches, a fact that drives *up* the annual HOURS total: Concord has one branch; Belmont has two branches, and; Dedham has one branch. These are all the reporting libraries with over 5,000 HOURS annually.
- Concord has a separate corporation that owns the building proper and pays for the facility and most collection costs; the municipal budget pays salaries, technology and utility costs only. This allows the tax base to be dedicated to paying for a longer service week in the form of staffing.

### **Total Circulation Activity per FTE:**

An inaccurate assumption in comparing staffing and circulation levels is the assumption that identical activities are performed at all circulation desks, and that circulation volume is the only predictor of staffing.

For example, Westford processes twice the number of Inter-Library Loans/network transfers as Sudbury, and the bulk of this processing is not the simple checkout at the circulating desks. Westford books 6 times as many meeting rooms and attracts 8,000 more youngsters to its programs. Westford handles over twice as many reference transactions as Sudbury. Because Sudbury does not collect data on daily attendees, it is not possible to contrast daily visits. All of these functions require staff apart from the circulation desk activities.

Data that is collected by the Board of Library Commissioners which the Commission's two charts do not address include: Daily Visits, Reference Transactions, Meeting Room Uses, Children's and Adult Programs, Program Attendees and number of volunteer FTE's. Including a comparison of these is necessary to *begin to* flesh out the service picture of the above libraries. Many other functions such as selection, collection development, mending, paging and shelving, publicity creation, overdue retrieval, phone calls for holds, etc. are NOT collected data, but are tasks engaged in at the Fletcher Library circulation desks, tasks that would continue to be performed by staff, even were the circulation desks combined.

Total circulation is a function of multiple factors – including the size and quality of a collection, the age demographics within a community, the educational level of a community and the proximity and accessibility of the library both geographically (to its own residents and to other towns' residents) and in terms of open hours.

### **Choice of Market basket communities:**

It is no surprise that the *top circulating libraries* in the Commission's market basket (with the exception of Reading) are all members of the Minuteman Library Network and the Metrowest Region. Conversely, only two of these libraries are in the Merrimack Valley Library Consortium (MVLC) – Burlington and Wilmington. Only four others are in our Northeast Massachusetts Regional Library System (NMRLS) – Reading, Marblehead, Stoneham and Wakefield. Within our consortium, the J. V. Fletcher Library has the *fourth-highest* circulation in the 36-member Merrimack Valley Library Consortium (MVLC) – outstripping such larger towns and cities as Billerica, Methuen, Lowell and Burlington. The J. V. Fletcher Library had the *fifth-highest* volume of deliveries through the Inter-Library Loan system of all 327 libraries in the Northeast Massachusetts Regional Library System.

However, one half of the Commission's market basket is comprised of Minuteman Library System members and Metrowest Regional Library System members – a more sophisticated urban group of libraries with a more versatile automated system, larger aggregate collections and significantly higher Total Appropriated Municipal Incomes (TAMI's). On average, the libraries in the Metrowest Region receive 36% higher TAMI's than the libraries in the Northeast Region according to MBLC data (41.55 vs. 26.62). When the MBLC provides a Peer Group Median survey based upon population group and equalized property value, the following 16 communities are included in their market basket: ACTON, BOURNE, CANTON, DEDHAM, MARSHFIELD, NEWBURYPORT, READING, SANDWICH, SCITUATE, SHARON, WAKEFIELD, WALPOLE, WESTBOROUGH, WESTFORD, WILMINGTON, and YARMOUTH. This represents an alternative set of market basket communities. Please see current charts attached comparing the Westford library to its population group and region in the areas of circulation, attendance and reference transactions.

**Idea No. L4 – Implementing Fines for Overdue Books and Materials:**

I am attaching an updated version of the Overdue Fines Analysis I presented the Commission last Fall. My concern is that your analysis does not include the constant labor cost of circulation staff collecting fines, amending or altering patron account records based upon discussions with the public, and the contentious dialogues that would ensue with the implementation of this “revenue” source. Far from gleaning \$3,000, this recommendation would cost the Town money and distract staff from genuinely patron-oriented tasks that would assist the public. (Please see **Related Costs** for my concerns on this).

**In Summary:**

The Commission for Efficient Town Government is using definitive state-supported data to contrast the J. V. Fletcher Library with other libraries within the Commonwealth. Using a *single* criterion will provide a misleading snapshot of true library activity and service levels, so comparing as many factors as possible collected by the MBLC is preferable. Raw data may need to be supplemented with additional information because of the wide variety of municipal funding anomalies within Massachusetts, and the variety of library governing structures across the state. Potentially, the market basket may need to include more of those libraries within the Westford *network and state region*. Finally, the resounding cost of implementing overdue fines is in the day-in and day-out act of collecting them from the patron and the ill-will generated from this true NON-service – typified in an unending series of contentious altercations involving due dates, dimes and tempers. Surely encouraging proud residents to invest in a Friends’ Family membership is a preferable revenue-raising strategy.

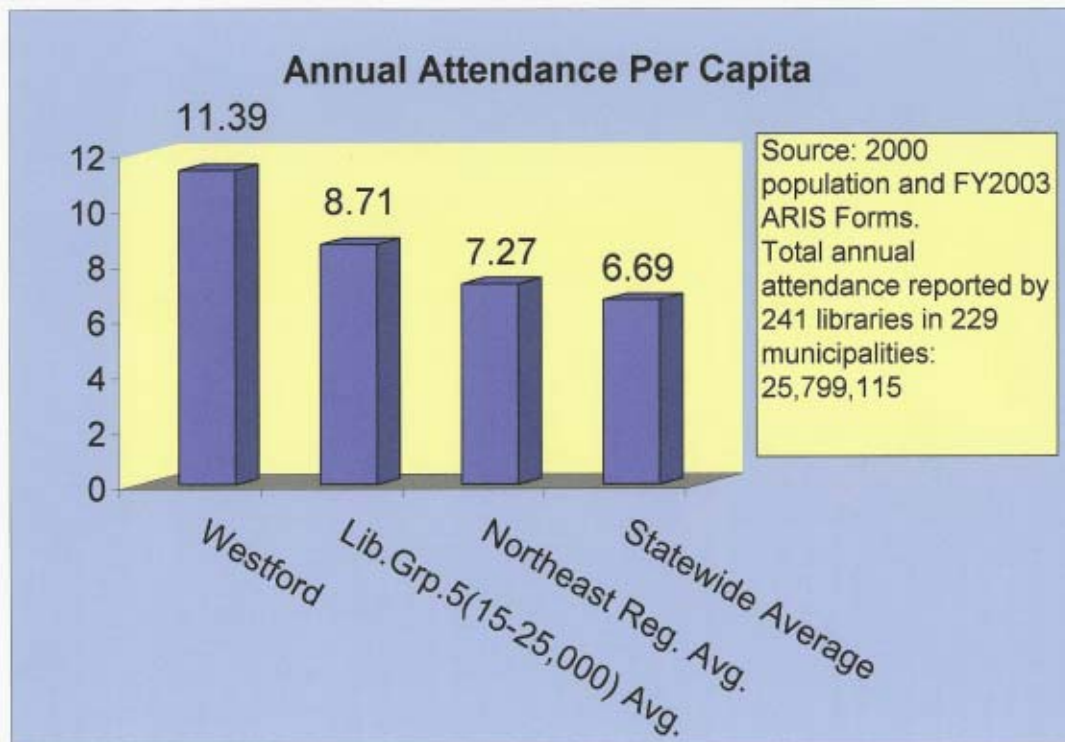
I wish to thank the Commission for Efficient Town Government for the opportunity to provide further background on its findings, and I would be happy to provide further material or data as needed.

Very Truly Yours,

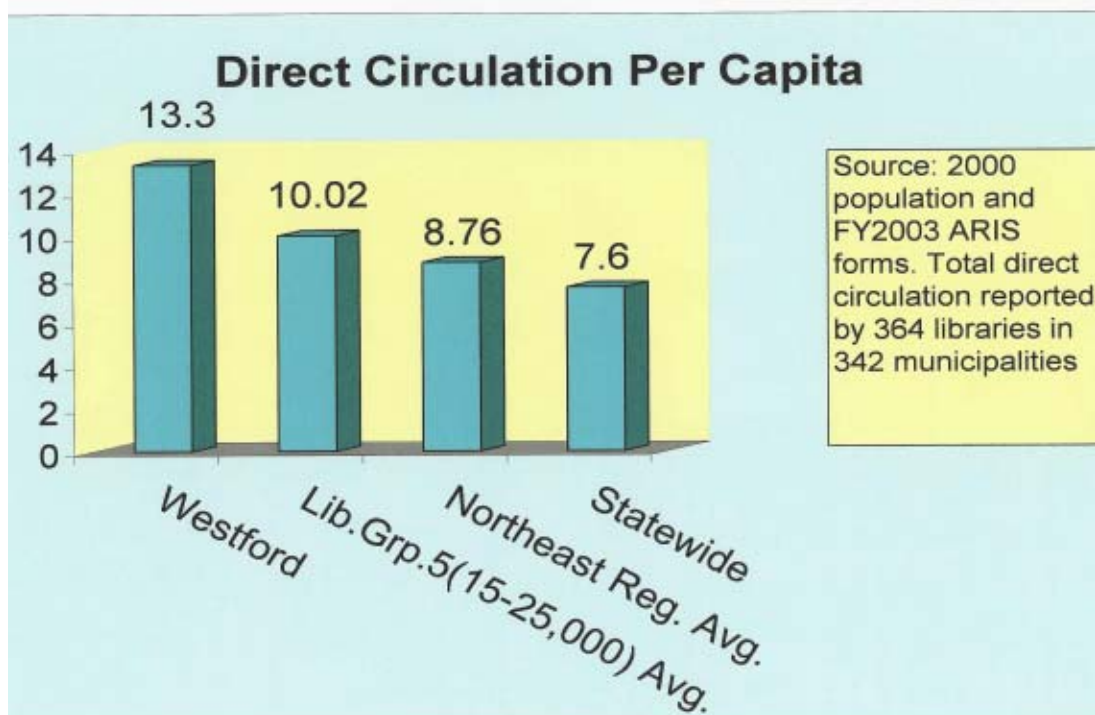
Ellen D. Rainville, Director

ENCLOSURES

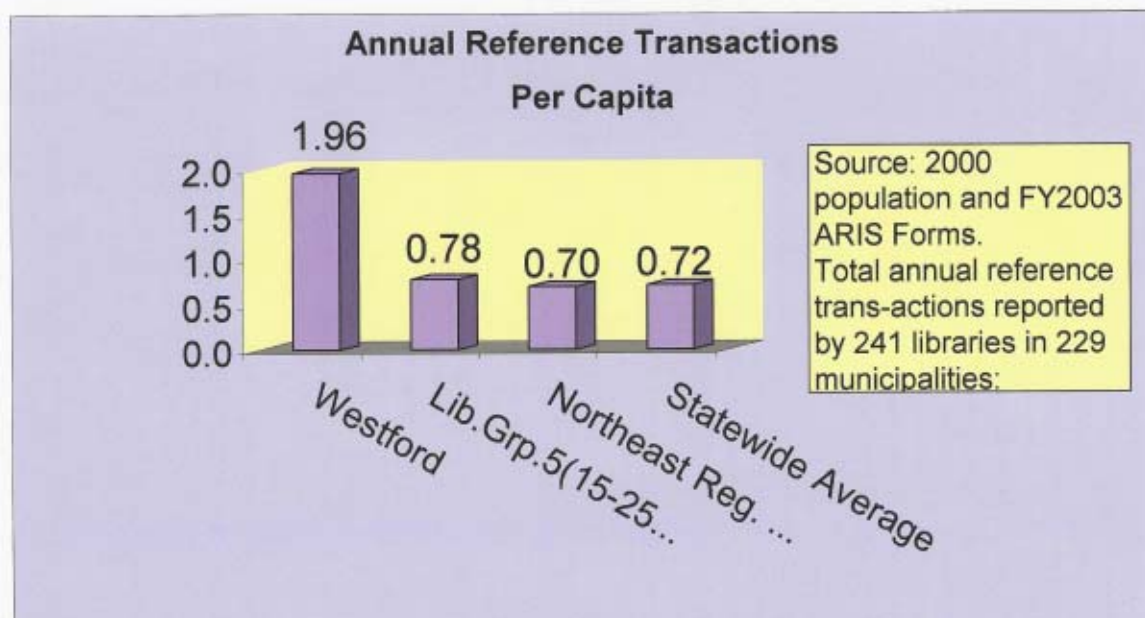
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J. V. Fletcher Library, Westford MA



J. V. Fletcher Library, Westford MA



## OVERDUE FINES ANALYSIS

### INTRODUCTION

This is an analysis of overdue fines -- one of the allowable income-producing charges that State Statute permits public libraries. The following is a statement of potential income from fines and of attendant costs to implement and sustain a fines-collection program.

### ANALYSIS

Based upon the attached 2002 Survey of circulation and fines income, a **potential income of \$15,907** might be gleaned from implementing this program at the J. V. Fletcher Library. The following is an expenditure/cost statement of staffing and supply needs, based upon information kindly provided by the Concord Public Library's Overdue Coordinator.

### COST STATEMENT:

#### **STAFFING:**

2 hours/day -- collect & count intake of prior day; record deposits; redistribute change to 3 workstations  
1 hour/day -- banking for 3 cash boxes/drawers (getting \$75.00 start-up change for each of 3 workstations)

#### **TOTAL BEHIND-THE SCENES STAFF TIME:**

3 hrs x 6 days x 52.2 wks x \$18.42/hr = \$17,307.44

#### **SUPPLIES:**

Cash Box with back-up change	\$47.50
Cash Bags (6)	\$78.00
Change Wrappers	\$24.00
Change Sorter	<u>\$70.00</u>

**TOTAL SUPPLY COSTS:** \$219.50

**TOTAL COLLECTION/RECORDING COSTS:** \$17,526.94

### RELATED COSTS:

Additionally, related costs would involve the Front-line Public Service Staff's monitoring and cashiering tasks -- i.e. actually collecting fine monies from patrons. This would involve a re-prioritization of tasks at the circulation desks (*books which now can wait to be handled must be checked while the patron is still physically present*) and actual collection of monies. With a possible projected reduction in staffing and service hours, this highly negative and time-consuming transaction appears neither cost-effective nor supportive of the Library Department's overall public service objectives.

Professional literature on the subject suggests that fines may actually discourage return of materials, as people are unwilling to pay the fines, especially if set higher than the customary \$.05 or \$.10 per day. Presently, lost materials comprise less than one-half of one percent of total circulation, and a large proportion of these materials are paid for and replaced. Implementation of this program might actually increase the number of unreturned, unpaid-for items.

### CONCLUSION

In conclusion, implementing a program of overdue fines is not viable as a potential income producer. The program's income **would not cover costs of implementation**, and levying higher fines would discourage returns, involving the Town in a costly material replacement process. This program would **steal valuable desk staff time away from the avowed public service objectives** of waiting on the public, assisting the public and answering questions. Fining for overdue materials constitutes a **"negative" service that penalizes the public** for having complex, modern, busy lives, and may ultimately prove a deterrent to return of library materials and support of the library department via other means.

*Evaluate the use of Traffic Details for the potential to reduce this expenditure.*

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**Recommendation:** We recommend the Town's management re-evaluate our current practice and policy on traffic details in an effort to reduce our costs in this area. Immediately, there is opportunity to reduce overtime expenditures by reducing the places and quantity of officers currently placed for traffic details. It is the Commissions opinion that there is opportunity to reduce our use of detail officers, therefore minimizing this financial burden on the taxpayer.

It is also recommended that the Town's management continually evaluate what is placed in the Police contract in regards to traffic details to provide more flexibility on how and when traffic details are performed. For example, utilizing lower paid flagmen, using our Highway and Water Department personnel to do traffic details for their own work, reducing the roads that require traffic details, challenging the rate paid for Town work vs. Town work performed by a private contractor and paying the market rate for police details vs. our current contract rate.

### **Summary of Findings**

**Pros:**

- Definite Savings to Town departments that utilize Police Details, Highway and Water Departments being primary users.

**Cons:**

- May lessen traffic safety if detail usage is reduced.
- Use of permanent traffic detail officer may be difficult to bargain given present Police contract given the precedent standard policy established over the years.
- Westford Police Policy and Procedure No. 5.01 III H "Traffic Control" #5 "Temporary Traffic Control Devices" - b. "The department shall not use portable part-time stop signs as temporary traffic control devices except in an emergency."

**Financial Analysis:**

Records of department expenditures on details and Police records of detail billings do not reconcile. FY 04 Police detail billings to date for Town Departments was \$138,200. Total detail charges for the Police Department for FY04 to date stand at \$497,032 of which charges to utilities was \$127,965. Average savings could exceed \$75,000+ if existing traffic enforcement officers were used as detail officers. Billings do not include detail costs paid by private contractors employed by the Town, as with the Permanent School Building Committee, the Highway Garage Building Committee, The Nashoba Valley School Building Committee or any contracted work by Highway and Water Departments. Should these savings be added the total savings increases several fold.

**Discussion:**

In order to realize savings from town work done by outside contractors, the present contract between the Town and the Police Officers would require modification. Specifically Article XVII "Extra Paid Details" would require elimination of Section 3 paragraph C - "However, when the Town is paying for a project that is conducted primarily by an outside contractor, said detail shall be considered an outside detail for the purposes of this contract." Note that the outside detail rate is higher than the Town detail rate, therefore when the Town uses a private contractor to perform work that requires a police detail; the Town

pays the higher detail rate. Appendix B “Westford Police Department Detail Officer Requirement Policy” attached to the contract does not appear in the Police Department Policies and Procedures manual as adopted by the Westford Board of Selectmen. The orphan policy document lists 45 streets that require details for private contractors and utilities even if employed by the Town. Any decision not to employ a detail on these roads would lead to a grievance by the union unless no officers were available for the duty. When no officer is available a flagman is acceptable.

The rate of pay is 1 ½ times the top step Sergeants pay with a minimum four hour charge, over four is eight hour minimum, over eight is ten minimum, over ten is twelve minimum, and over twelve is actual hours worked. The base charge is \$160.92 (4 hour minimum at \$40.28 by current contract) for a single detail officer for work done by contractors for the Town. Detail work done for the Town when town employees do the work is charged at 1 ½ the particular officers regular hourly wage with a four hour minimum.

The need for a “Detail for the Town of Westford” and the number of officers required is at the sole discretion of the Police Chief. Thus the type and number of details utilized by the Town when work is not done by an outside contractor is strictly a management issue.

No state law or regulation has been found that requires the use of police details for roadwork.

*Evaluate renting the Police Training Room and Shooting Range for a profit.*

---

**Recommendation:** Rent the unused capacity of the Police Shooting Range and Training Room to provide revenue to the Town.

**Summary of Findings**

**Pros:**

- Potential revenue source for Town

**Cons:**

- Liability issues
- Ease of use by WPD staff

**Financial Analysis:**

Depending on promotion and active sale of space, there are groups who would pay to use both the training room and shooting range. Current revenue \$0, anything above this is worth the effort.

**Discussion:**

The training room and shooting range should be rented out to any interested groups who are willing to pay a fee that covers not only the costs of supervision and any extra insurance costs, but a profit margin of at least 100%. If it costs us \$50 per hour to staff the shooting range with a qualified range supervisor, the rental should be at least \$100 for the hour. Supervision doesn't come into the equation with the training room. Groups from Roudenbush or local for profit schools and training facilities should be contacted and notified that the training room is available for a fee.

Blocks of time for both facilities should be set aside for WPD and Town use and the remaining hours in the day should be set aside for possible rentals. Prime teaching and renting hours should be left in inventory to ensure quality time is available for rent.

The liability issue should be resolved by a minimum insurance requirement for any group renting the shooting range.

*Modify the teachers' contract so that fees can be collected for teachers' children from another town that attends Westford schools.*

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**Recommendation:** We recommend pursuing a legislative change that would allow schools that educate teachers' children to be reimbursed under school choice. We also recommend that we track and forecast the ongoing cost to the Town of providing this benefit.

### **Summary of Findings**

**Description:** Westford provides to its teachers who do not live in Westford, as a benefit in their union contract, the option of having their children attend Westford schools at no charge. This benefit, as written, eliminates the possibility of Westford being reimbursed by the sending town as we are when we accept other school choice students. The proposal is to handle teachers' children as other accepted school choice students allowing them in, but being reimbursed by the sending town.

**Analysis:** It is unclear whether we can selectively accept these students along with other school choice students and still qualify for reimbursement. If the answer is that we cannot qualify for reimbursement, the analysis is whether the cost of the program in a given year is justified by the morale boost it provides staff. This particular benefit is commonly provided in a school setting, particularly in private schools in our region. Thus, I think it would be difficult to eliminate this benefit, particularly if the revenue to be generated is relatively small. According to staff, we have approximately 12 faculty children in our schools and this is an important benefit to those who take advantage of it, since it simplifies their daycare needs.

If, on the other hand, there is a way to accept these students and still receive reimbursement as a part of our overall school choice program, then we should consider whether our teacher contracts can be revised so that we can continue to provide the benefit to our teachers and yet receive compensation for educating these students from the school that would otherwise have that obligation.

***Reinstate school choice.***

---

**Recommendation:** Given that in 1998 we had 84 school choice students and in 1999 we had 74 school choice students, (both of which figures were a larger percentage of outside students since our enrollments were lower at the time) and we were able to absorb those students successfully, we would recommend adding no more than 100 school choice students in grades 6 through 12. We would then continue to manage that amount so that it stays at or near 100 students into future years until our best conservative projections show that there will not be available capacity for those students, at which point we would incrementally reduce that amount until we have no available capacity in our system. This should generate approximately \$450,000 of additional revenues.

**Summary of Findings**

**Description:** The Commission proposes that the school, using the best projections available, fill empty seats in our classroom in grades where there are seats available. By seats available, we mean classroom space available, since there is potential for generating additional revenue to operate our schools even if we are required to hire additional teachers to maintain our teacher/student ratios since our fixed cost of providing school facilities are the same and we incur those costs whether or not we educate the additional students. We recognize that there may be significant offsetting staffing costs that need to be considered. Since our objective is to close the gap between our funding needs and our available funding in the next few years, our focus would be at the middle and high school levels where we have recently dramatically increased the size of the facilities and yet will not fill them with Westford students for quite a few years. This also allows us to “sunset” these students within a relatively short period of time to make way for larger classes that are coming through our system.

**Analysis:** Since we have been fortunate enough to expand a number of our facilities in recent years we do have substantial excess capacity within our school system in the near term. It is important that we not fill spaces that will ultimately be filled by our own town children, so our focus should be on the later years, either middle school or high school available spaces. We also need to take into account that our town continues to grow both by virtue of new home construction and sales of homes by families with no children to those with school age children. Thus, there will be internal growth beyond the increase in class sizes as each year moves up a grade. In past years, school choice has provided over \$300,000 of revenue annually to help fund school programs. A major benefit to this type of change is that it allows us to continue to provide excellent education by increasing revenue rather than cutting services or activities to meet budget constraints.

If you look at Chart A, “Trend of School Choice Receipts”, you see as recently as 1998 and 1999 we received over \$300,000 in annual school choice receipts. The chart shows that this amount has recently dropped precipitously to a projected \$40,000 this year for the 4 eleventh graders and 3 twelfth graders in our system. As you can tell by the grades these students are in, these funds will evaporate completely in two years. Looking at Chart B, “Funding Sources Outside of the General Fund FY2003 Summary as of 6/30/03”, you can see the historic, substantial fund of school choice receipts is depleting each year and will run out before long.

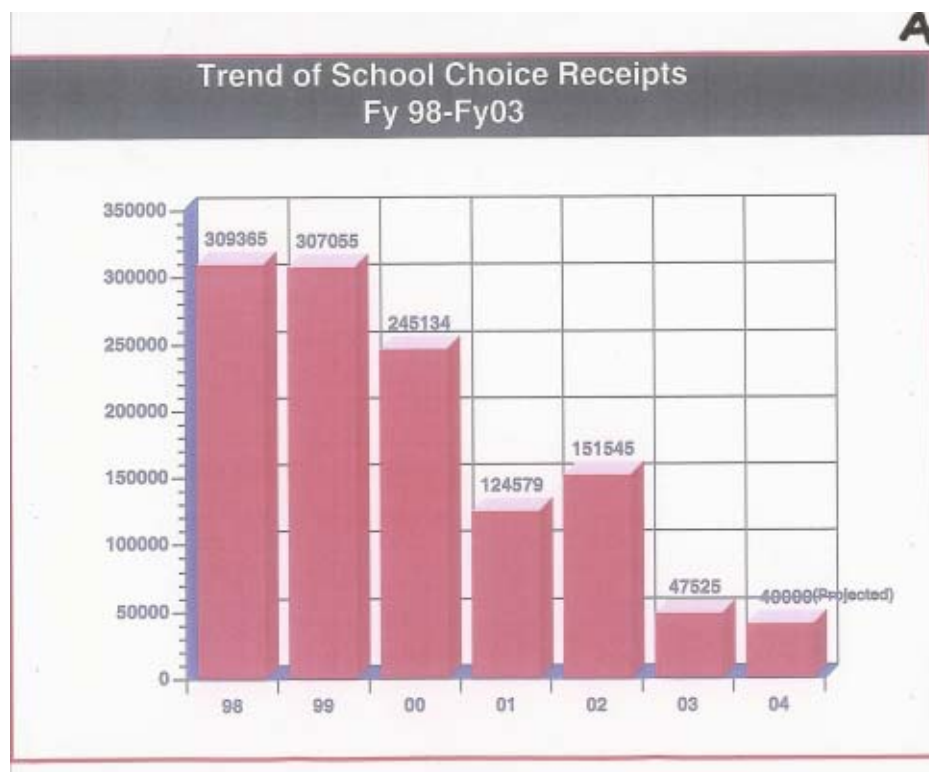
Chart C, “Six Year School Choice Enrollment Trend FY98-FY03”, shows that it took between 75 and 85 students in 1998 and 1999 to generate over \$300,000 in revenue. Although the cost of running schools in most towns exceeds \$6,000 per pupil, the accepting school only receives approximately 75% of that or about \$4,000 per pupil 4 to 5 years ago. Per student reimbursement is projected at about \$4,500 today.

Turning to our actual enrollment (see Chart D, “2003-2004 Enrollments October 1, 2003”), we find the following:

School	Students Enrolled 2003	Building Design Capacity	Available Capacity
Blanchard	596	900*	304
Stony Brook	624	750	126
Westford Academy	1354	1850	496

\*The School Committee has a standard of 750 students for both middle schools.

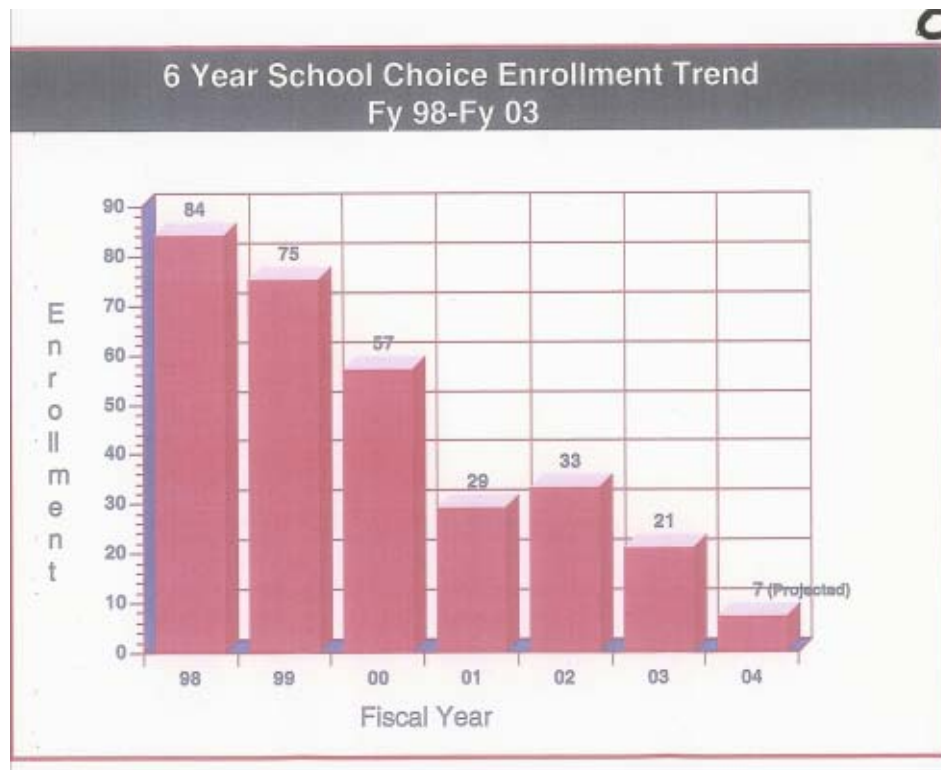
The chart shows our buildings have over 400 seats of unused total capacity. While we do not support using all or even close to all of that capacity due to continuing town growth, if you examine the figures for births in the last four years (see Chart E, “Number of Children Born in Westford 1990-2002”), you will see they have been relatively flat. Despite this, we have seen system-wide growth averaging slightly under 200 students over the last seven years, although three of the last four years were below average (see Chart F, “Incremental Enrollment Change – Past 6 Years”). Examining those figures a little more closely, you find that between 2002 and 2003 an inordinate amount of that growth came in the first three grades (see Chart G, “Students per Grade Comparison October 2002-October 2003”). As the chart indicates, in the seven middle and high school grades, our enrollment increased by a mere 28 students between 2002 and 2003.



**FUNDING SOURCES OUTLINE OF THE GENERAL FUND  
FY 2003 SUMMARY AS OF 6/30/03**

**B**

	TOTAL	SCHOOL CHOICE FUNDS	FOUNDATION GRANT	HIGH ENROLLMENT GRANT
B/FWD 7/1/02	981,521.95	604,035.23	86,636.72	290,850.00
FY03 Activity to Date:				
YTD School Choice Receipts	76,033.00	76,033.00		
YTD 6/30/03 general charges to School Choice				
P/Y Invoices	(29,021.54)			
FY03 Invoices	(30,238.91)			
YTD Kindergarten Buses as of 6/30/03	(87,220.00)			
	(146,480.45)	(146,480.45)		
Balance at 6/30/03	911,074.50	533,587.78	86,636.72	290,850.00

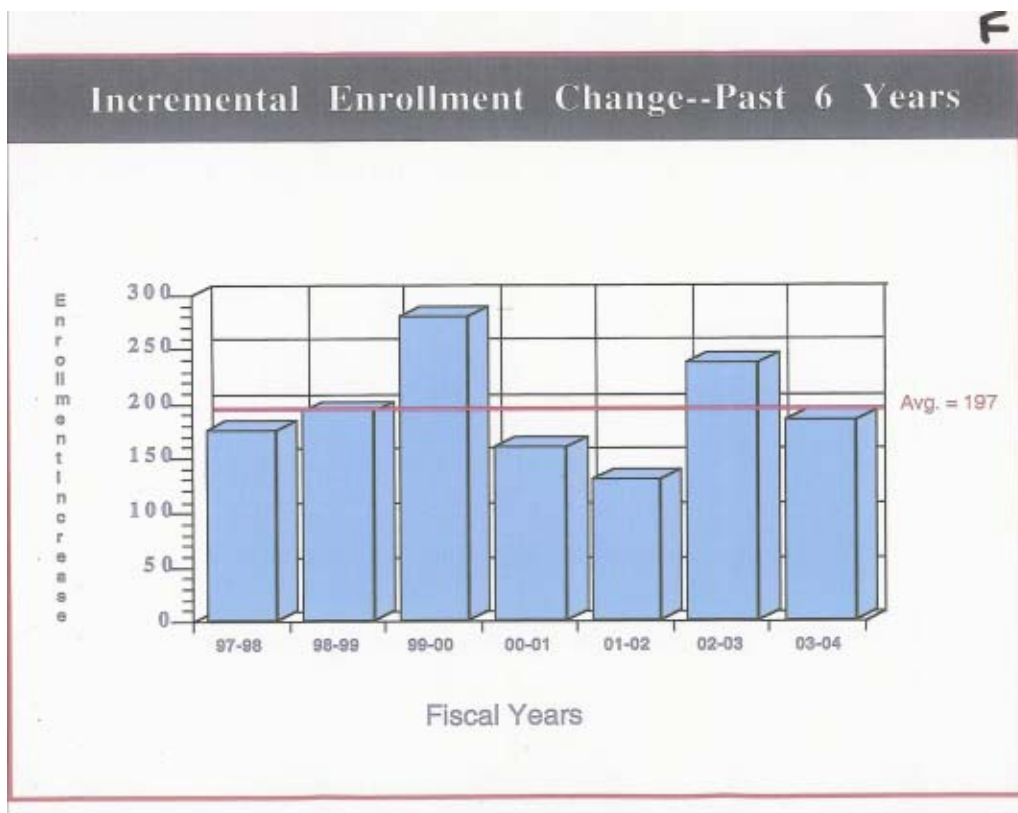
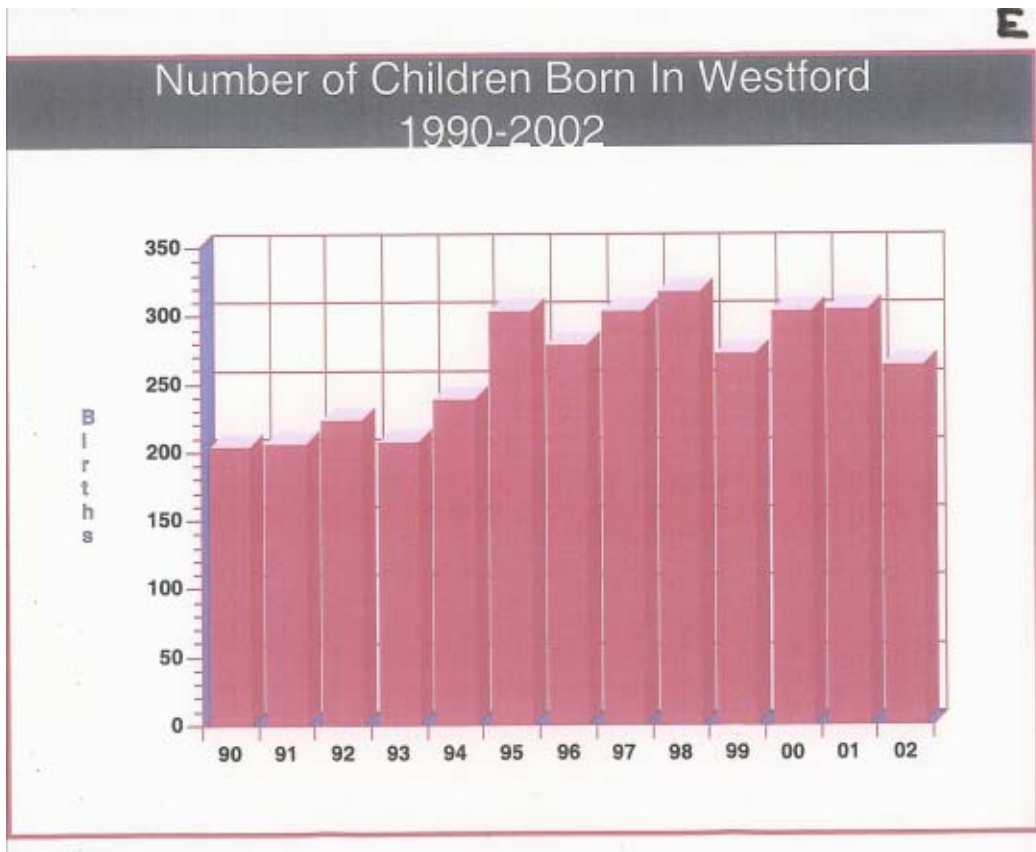


**C**

**2003-2004 ENROLLMENTS**  
October 1, 2003

[illegible]

Note: Class sizes for multi-grade classes are indicated within a box; Total Enrollment includes PreSch and PDD-K





STUDENTS PER GRADE COMPARISON  
OCTOBER 2002 - OCTOBER 2003

<u>ENTERING GRADE</u>	<u>OCTOBER 2002</u>	<u>ENTERING GRADE</u>	<u>OCTOBER 2003</u>	<u>ENROLLMENT CHANGE</u>
K	368	1	437	69
1	418	2	396	(22)
2	419	3	435	16
3	416	4	420	4
4	397	5	400	3
5	408	6	423	15
6	393	7	404	11
7	396	8	393	(3)
8	348	9	354	6
9	361	10	366	5
10	310	11	310	0
11	330	12	324	(6)
12	312	K	396	84

<b>TOTALS</b>	<b>4876</b>	<b>5058</b>	<b>182</b>
---------------	-------------	-------------	------------

*Evaluate class sizes, i.e. increasing size, variable class sizes, instituting a minimum class size etc. Evaluate offering low attendance classes on alternate years/terms.*

**Recommendation:** We recommend to further evaluate class sizes, taking into consideration the points outlined in this document, to determine if creative changes in our class sizes/offerings could result in a reduction of our teaching staff without considerably compromising the education of our students.

### Summary of Findings

#### **Discussion:**

The chart below shows the ratio of overall teachers to students at the different school levels with different assumptions made. The purpose of this exercise was to determine if anything could be learned about class size when you look at the teacher to student ratio as a whole. This information is not intended to convince people that the figures on the bottom line should be the same as the School Committees policy on class size. The attached spreadsheet contains the data used to generate the ratios below.

	High School	Middle School	Gr. 3-5	Gr. K-2
<b>School Committee policy on class size</b>	25	25	22	22
<b>Teacher total/ Student ratio</b>	1:14.4	1:15.4	1:16.8	1:18.7
<b>Less PE teachers</b>	1:15.0	1:15.8	1:17.5	1:19.2
<b>Less Art/Music &amp; health where app.</b>	An elective – not deducted	1:17.7	1:20	1:20.5
<b>Add Math Tutors and Reading Facilitators</b>	n/a	n/a	1:15.5	1:17.8
<b>Add Teaching Assistants</b>	1:14.7	1:17.2	1:13.9	1:14.2

In looking at this data, the following areas warrant further investigation to determine if reductions in our teaching staff can occur without jeopardizing the class size goal as outlined in the School Committee policy:

- The wide variety of course offerings at the high school most likely contribute to the low teacher to student ratio. For those classes that are very small, are there options to offer them on alternate terms/years so that when they are taught there is a higher class size?
- Should we offer some of our classes in a lecture type setting with a larger than average number of students/class? This would help to balance out the small classes and would help prepare our students for the type of classes they will have in college. We currently have several classes that we keep much smaller than the School Committee policy due to either the nature of the material being taught or the needs of the students in the class (i.e. the math connection classes). This is an excellent example of looking at each course and determining what class size creates the best learning environment. Looking at the other side, evaluating those classes that would be

acceptable to teach with more than 25 students would help to keep our teaching staff budget in control while still offering an excellent education.

- Should we have a minimum class size and discontinue those classes that repeatedly cannot garner enough students to meet the minimum? We recognize that some classes must be run no matter what the enrollment is, however are there others that should have a cut-off?
- The extra support personnel at the elementary level drive the teacher to student ratio down. The Commission for Efficient Town Government, based on a separate study, feels there may be an opportunity to reduce the number of personnel in this area and recommends this be investigated further.

### **Student/Teacher Ratio Analysis**

28-Sep-03

	<b><u>HS</u></b>	<b><u>MS</u></b>	<b><u>Gr. 3-5</u></b>	<b><u>Gr. K-2</u></b>	<b><u>Comments</u></b>
Students	1355	1219	1259	1231	August enrollment numbers
Teacher total - in budget	94.2	79	75.1	66	Teacher totals, final budget line item
Art/Music teachers	6.4	6	9.05	4	Will remove from teacher total, middle school & down*
PE teachers	4	2	3	2	Will remove from teacher total*
Health teachers		2			Will remove from teacher total*
Math tutors	0	0	9	3	Additional headcount to teacher total
Reading Facilitators	0	0	9	6	Additional headcount to teacher total
TA's	2	2	9.25	17.65	Additional headcount to teacher total

\* - if an entire class moved to this teacher and the "homeroom" teacher was not present, these teachers were removed for the student/teacher ratio calculations below. For electives, i.e. Art/Music in the HS, the teachers remained in the ratio analysis below.

**Rationale:** (1) If a teacher is present in the class with the "homeroom" teacher, the actual student/teacher ratio is affected and that headcount is included below. (2) If the subject a teacher teaches is an elective, i.e. art/music in the HS, the teachers were included in the headcount below because they affect the overall ratio in the classroom.

**Note:** Special Education teachers are not included in these numbers; however the students may be included in the enrollment numbers.

***Changes to the foreign language requirements in the Middle School.***

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**Recommendation:** A change to the foreign language program is not recommended at this time, with the exception of suggesting that further study of reducing the languages from 4 to 3 may be warranted as a cost savings opportunity.

**Summary of Findings****Discussion:**

According to the 5/10/03 version of the school budget, we have 8 foreign language teachers in the Middle Schools. The idea of eliminating or reducing the foreign language requirement in the Middle School was investigated for two reasons:

1. To reduce stress on the Middle School student during these difficult years
2. To determine if there was a cost savings by reducing the foreign language requirement.

Facts on foreign language in the Middle School:

1. It is not a state requirement at this time to offer foreign language at any grade.
2. 3 years of Middle School foreign language is approximately equal to 1.3 years of High School foreign language.
3. Many colleges require a foreign language for admission. The requirement varies by school, the range being from 2-4 years.
4. This year, the 6<sup>th</sup> grade curriculum has been changed to focus more on the culture and oral part of a foreign language. Homework is kept to a minimum.

**Pros:**

- A potentially positive change, from a financial perspective, would be to offer 3 foreign languages instead of 4. This would only be a cost savings if positions could be eliminated without exceeding the class size limit. This change may also affect the offerings at the High School.

**Cons:**

- It was felt that by taking a foreign language in the Middle School, the students perform better and progress much faster in the High School foreign language classes.
- If foreign language were eliminated in the Middle School, the number of students eligible to take AP classes would be reduced.
- It is believed there would be a substantial number of parents opposed to eliminating foreign languages completely.
- The administration has modified the foreign language curriculum this year for the 6<sup>th</sup> graders to help ease the transition to Middle School. It would be worthwhile to evaluate the impact of this change before making others.
- Studies show that the earlier students learn a foreign language, the better they are able to pick up the language. Eliminating foreign language in the Middle School would affect the learning of this subject.

**Financial Analysis:**

Due to finding many reasons not to eliminate the foreign languages in the Middle School, a detailed financial analysis was not conducted. If foreign languages were eliminated or offered only in 7<sup>th</sup> & 8<sup>th</sup> grade, there may be some cost savings, but it would not be significant since other teachers would have to replace those that were teaching the languages.

***Eliminate the Technology Learning Center (computer lab) for grades K-2***

---

**Recommendation:** We recommend eliminating the Technology Specialists in the three K-2 schools noting that it is important to ensure teachers are properly trained in the use of computers for this to be successful.

**Summary of Findings****Pros:****Eliminate the Computer Labs and Technology Specialists**

- Annual savings of \$121,411 plus those costs associated with computer technical support and software.
- Potential one time short term savings of \$49,000 (see more detail on this figure in the Financial Analysis section) if re-directing these computers resulted in not having to purchase computers for the higher grades.
- Computers may be placed at higher grades where the utilization would be higher. The current utilization of the computers in the K-2 Technology Learning Center is approximately 29%.

**Eliminate Technology Specialists Only**

- Annual savings of \$121,411.
- Classroom teachers take over the entire responsibility of technology instruction, thus involving them more in this aspect of educating their students.
- Current curriculum program will stay intact.

**Cons:****Eliminate the Computer Labs and Technology Specialists**

- By not providing computer instruction at the younger grades, more time would have to be spent in 3<sup>rd</sup> & 4<sup>th</sup> grade to meet the framework requirements for computer knowledge, thus taking time away from other instruction. Note: The curriculum framework requirements for instructional technology standards at the lower grades are combined for grades PreK- 4.
- The K-2 math program would have to be altered to compensate for no computers. Currently the curriculum requires some instruction with the computers.
- Other uses of the computer for learning would be eliminated, i.e. Science and writing activities.
- It was felt by Ron Koehler that some instruction is more effective with the use of computers, and that computers can aid in addressing individual learning styles; therefore eliminating their use would hinder optimal teaching methods.

**Eliminate Technology Specialists Only**

- For the first few years, it will be more difficult on the classroom teacher as they learn the technology and how to teach it to their students.
- It was felt by Ron Koehler that eliminating the Technology Specialists would result in a decrease in the *effective* use of this technology.

## Financial Analysis:

### Salaries:

1 Full time position eliminated:

\$61,010 – salary

\$23,183 – benefits (estimated at 38% of salary)

\$84,193

½ Full time position eliminated:

\$26,970 – salary

\$10,248 – benefits (estimated at 38% of salary)

\$37,218

**Total Annual Salaries: \$121,411**

### Computers:

There are approximately 77 total computers in the computer labs at the K-2 schools; however those at the Miller School must remain there, therefore potentially freeing up 49 computers. At a purchase cost of approximately \$1000 each, there is potential for a \$49,000 short term cost avoidance if these same computers could be used elsewhere where there are plans to purchase additional computers. Note that the depreciated value of these 49 computers is \$36,000 and are 2-3 years old, therefore new computers would need to be purchased in 3-4 years vs. the expected life of 6 years if these computers were transferred to another school. There are also savings for computer technical support and software purchases that were not included in this analysis.

### Notes:

- Benefit estimation obtained from Chris Liebke, Director of Human Resources
- Computer cost obtained from Ron Koehler
- Salary rates obtained from the FY04 School budget

**Attachment:** Response letter from Ron Koehler, dated April 1, 2003

STEPHEN C. POSTER, Ed.D.  
Superintendent of Schools

EVERETT V. OLSEN, M.B.A.  
Assistant Superintendent



LORRAINE TACCONI-MOORE, M.A.E.  
Director of Curriculum

RON KOEHLER, M.A.  
Director of Educational Technology  
and Information Services

KEVIN M. DWYER, Ed. D.  
Director of Special Education

## Westford Public Schools

*Shaping the future one child at a time.*

35 TOWN FARM ROAD • WESTFORD, MASSACHUSETTS 01886  
<http://westford.mec.edu/schools/> • (978) 692-5560 • FAX (978) 692-4842

April 1, 2003

Nancy Rosinski  
Commission for Efficient Town Government

Dear Nancy:

Thank you for sharing your summary analysis of the elimination of Technology Learning Centers (TLCs) from the K-2 schools and for affording me the opportunity to comment before you present it to the Commission.

I would like offer comments in four areas as follows.

### **Impact on Teaching and Learning**

Among the "con" arguments mentioned in regard to eliminating the TLCs in the draft report is that "the K-2 math program would have to be altered slightly to compensate for no computers." The computer-based activities in our standards-based mathematics curriculum are core activities that occur in units considered by the authors to be a "particularly effective tool for learning mathematics content." Fran Tillman, our elementary mathematics coordinator tells me that it is incorrect to characterize the alteration of eliminating the TLCs as "slight" and that such a change would mean that "an important component would be missing."

I believe that it is also important to note that it is not mathematics instruction alone that would be impacted by the elimination of technology resources at this level. In the area of language arts, a series of high motivation, publishing-for-a-purpose writing activities would have to be set aside as would range of activities in our *Science Curriculum Handbook*. This is more than a matter of making other choices from a range of equally desirable alternatives. Different children have different learning styles and we find that the computers provide a tool for playing to the unique learning strengths of individual children. All three of our elementary curriculum coordinators have emphasized strongly that this step would take away access to a key asset in our efforts to address individual learning styles.

### **Instructional Technology Specialists**

In discussing the elimination of technology educators at this level the report says that "classroom teachers take over the technology instruction, thus involving them more in the education of their students." Classroom teachers could not be involved more in the instruction that takes place with the aid of technology since these activities are conducted by the classroom teacher alone or using the consultative model in which technology specialists and classroom teachers co-plan, co-teach, and co-assess the learning unit.

The technology teacher brings a different set of knowledge and skills to these activities (technology specialists work under a different educator license from elementary teachers). At the same time that they are partnering in the delivery of direct services to students, technology specialists are providing ongoing support to teachers in the pedagogy associated with effective technology use. The literature is consistent in citing ongoing support for teachers as a key element in effectively integrating technology into teaching and learning. We could expect the elimination K-2 technology specialists to result in a profound decrease in the *effective* use of technology in teaching and learning primary grades.

Eliminating these 1.5 FTE positions would also decrease our technology specialist ratio, one of the criteria on which our eligibility for state technology funding is based. Given state benchmarks, I do not think that we would be disqualified from funding at present, but the Massachusetts Department of Education is in the process of revising these numbers to require a higher level of support.

#### **Usage**

The report cites the "current utilization of computers " in the primary TLCs to be "approximately 29%." I am not sure how this number was arrived at but do know that it is difficult to quantify the amount of time these facilities are used because they vary greatly given the time of the year (stages of the curriculum sequences) and availability of the technology specialist (each K-2 school is serviced by a .5 FTE instructional technology specialist).

On days when the instructional technology specialist is present, the part of the school day in which the TLC is scheduled can range from approximately 40 to 100%. On days when the specialist is serving another school, this number ranges from 0 to approximately 50%. This gap resulting from the absence of the technology specialist indicates the importance of this position and indicates what we might expect to happen in terms of technology usage if this it were eliminated.

#### **Hardware Cost**

The "potential one time savings of \$77,000" for redirecting computers in the K-2 TLCs to the higher grades assumes that all of the computers are new and that all could be redirected.

Since it would be illegal to redirect the Miller computers (purchased through state school building assistance funds) to another building, only the 49 computers at the Nabnasset and Robinson schools could be moved. Since these machines are 2-3 years old and educational computers are generally replaced after 6-7 years (at which time they are usually more than obsolete for educational purposes), the amortized cost savings of repurposing would be closer to \$36,000. Since these are primary grades systems we would need to purchase software licenses that would make them appropriate for the grades in which they would be placed, further reducing the cost savings to around \$31,000.

#### **In Sum**

In summary, I would make the following reflections on your draft report:

- Elimination of the Grades K-2 TLCs would have a significant negative impact on teaching and learning in basic curriculum subjects and on the ability to address multiple learning styles.
- We could expect the elimination K-2 technology specialists to result in a profound decrease in the *effective* use of technology in teaching and learning primary grades.
- The savings realized by redirecting computers from the Nabnasset and Robinson TLCs would be closer to \$31,000 than \$77,000.

At the end of the day, the use of educational technology is part of the complex system of teaching and learning in Westford. Because the change in one part of a system affects all other parts, budget reduction proposals for the School Committee consideration have, in the past, come from the collective deliberations of the school system Leadership Team. I would respectfully suggest that the relative educational importance of K-2 TLCs and technology specialists is reflected in the fact that they have been preserved in the various budget recommendations made heretofore by the Leadership Team.

I hope that this response is helpful for you in preparing your presentation to the Commission. I thank you for the opportunity to offer it and remain willing to answer any further questions from you or other members of the Commission.

Sincerely yours,

Ron Koehler

---

*Evaluate the need/use of Teaching Assistants (TA's), Math Tutors and Reading Facilitators*

---

**Recommendation:** We recommend that the School Administration evaluate this area of opportunity further.

**Summary of Findings**

**Discussion:**

As outsiders going through the school budget detail, we were struck by the amount of personnel we have that is in addition to our classroom teachers. Specifically, the quantity of Teaching Assistants, Math Tutors and Reading Facilitators stood out. In this write-up, we will not propose a recommendation on reductions, as further study is needed, however we hope to raise awareness in these areas and prompt our School Committee and Administrators to study this in further detail.

Based on the finding of the Commission for Efficient Town Government (CETG), it appears that we may have an opportunity to reduce the number of Teaching Assistants, Math Tutors, and Reading Facilitators to aid in our budget deficit issues. We currently spend in excess of \$1.1 million in salaries & benefits on personnel in these areas. If we could continue to provide an excellent education to all our students by utilizing our support personnel differently, implementing creative classroom structures and enhancing the use of parent volunteers, the potential exists to significantly reduce the headcount in this area. It is known that one of the reasons that our Special Education enrollment is one of the lowest in the state is due to the extra support we can provide our students. It is not our intent to jeopardize this in any way, nor do we want to take away needed support for students struggling in a particular area.

We offer the following points to consider:

- Are we effectively utilizing our Math Tutors and Reading Facilitators in the best possible manner to help children struggling in the subject? Based on a very limited survey of students, it appears that at least the Math Tutors are used more as a general support in the classroom vs. focusing on those that most need assistance. (Reference attached document). If this indeed is the case, isn't there an opportunity to reduce Math Tutors by focusing the ones that we have on those children that most need it?
- Do we need so many Reading Facilitators in grades K-2 when we have 2 full time Reading Resource teachers in each school?
- Could we use parent volunteers to read with children rather than having so many Reading Facilitators?
- Could volunteers play a larger role in helping the classroom teacher, thus reducing the need for Teaching Assistants? It is understood that volunteer reliability is an issue; however it is felt that there are opportunities to address this. Some thoughts to consider in this area:
  - o Could there be a "general pool" of volunteers that help on a given day that is in excess of what is needed to cover the activities of some of the Teaching Assistants. This would allow for some unexpected "no shows" without negatively affecting the teachers planned activities.
  - o Could our Seniors help in the classroom and receive a tax break in return?
  - o Since training the volunteers can be a time consuming activity for the teachers, could we have lead volunteers that train other volunteers?
  - o Some teachers utilize volunteers more than others. Could we provide training to the teachers on how volunteers can help them in the classroom without being a burden?

This is a short list of ideas on how we could address the issues associated with utilizing volunteers. Perhaps this would be a good project for a School Council to undertake.

- Rather than apply TA's, Math Tutors and Reading Facilitators somewhat evenly across the classrooms, should we only utilize these support people in specific classrooms where they are needed? In doing so, we may reduce the overall quantity of support people required without affecting the education of those students that need extra assistance.
- Is there an opportunity to create more differentiated instruction utilizing our classroom teachers by moving students around for a particular subject based on their particular needs? This would provide more focused instruction to students without the use of additional personnel. An example of this currently in use is the differentiated math program in 5<sup>th</sup> grade (children move to a math class which is either a "regular" or accelerated class).

### Financial Analysis

#### Current headcount

	HS	MS	Gr. 3-5	Gr. K-2	Total Teachers	Total Salary & Benefits**
TA's	2	2	9.25	17.65	30.9	\$723,454
Math Tutors	0	0	9	3	12	\$190,743
Reading Facilitators	0	0	9	6*	15	\$247,945
<b>Total</b>						<b>\$1,162,142</b>

\* This is in addition to the 6 full time Reading Recovery teachers.

\*\* Benefits estimated to be 38% of the salaries per C. Liebke

**Notes:** 1. This does not include TA's for Special Education students. 2. Headcount & Salaries taken from the 5/10/03 Final Budget

#### Comparative Data:

	Westford	Acton/Boxboro*	Groton/Dunstable	Carlisle	Mequen, Wisc.*
Math Tutor/Student Ratio	1:207	0:1777	Awaiting data	0:537	1:1238
Reading Facilitator/Student Ratio	1:166	1:355		1:269	1:309
Teaching Assistant/Student Ratio – Gr. K-5	1:93	Not avl.		1:179	Not avl.
% of children enrolled in the Special Education Program	9.6%	12.5%		11%	Not avl.
Max. class size in the elementary schools	K-5: 22 students	K-2: 22 students 3-6: 25 students	K-5: 23 students	K-5: 25 students	Not avl.

\* 2002/2003 enrollment numbers used. **Notes:** 1. Mequen, Wisc. is one of the top rated school districts in Wisconsin. The information was obtained from this school to provide a non-Massachusetts reference point. 2. August Westford enrollment numbers were used

*Evaluate the use of Math tutors in grades 3-5.*

**Recommendation:** We recommend the School Administration investigate this area of opportunity further.

**Summary of Findings****Discussion:**

In speaking with Stephen Foster and Kevin Regan (Principal of the Day School), both articulated that the role of the math tutor is to help those children that require extra assistance in math to bring them on par with the class average. The tutors should either work with small groups of children or one on one. Based on the 1/23/03 version of the FY04 budget, there will be 8 math tutors at the 3-5 schools next year.

Based on a VERY limited poll of students at different elementary schools, it appears that there may be a disconnect between what the math tutors are intended to do vs. what is actually occurring in the classroom. Listed below is a sampling of comments received from children when asked what the math tutor did that day:

- "The math tutor walked around while the teacher was giving the math lesson to stop the kids that were fiddle faddling"
- "Part of the time she corrected papers"
- "The math tutor helped a small group of students that had a hard time with last nights homework"
- "The math tutor taught the class"
- "Sometimes my teacher may leave the room for a little bit when the math tutor is in the classroom"
- "The math tutor walks around and helps the kids that need it"

Clearly a conclusion cannot be drawn from this limited sampling; however it does bring to light that further investigation into the current role of the math tutors is warranted. It appears that perhaps the math tutors have expanded their role to add "teaching assistant like" responsibilities. The Commission for Efficient Town Government is not in a position to pursue this further as the next step is to get into the classroom, talk with teachers, tutors etc., something that is not our place to do.

Should a further investigation by the school administration substantiate these findings, one of two things can/will occur:

1. By re-focusing the role of the math tutors to that which was intended, the children that need help in math will get more of it, therefore potentially enhancing their learning in this subject.
2. By focusing the math tutors to helping those children that need extra help, thus improving their efficiency, the number of tutors/school may be able to be reduced while maintaining the current level of support we provide today. This will provide a cost savings to the schools.

**Financial Analysis:**

Average salary of 3-5 grade math tutor:	\$12,229
Estimate of benefits*:	\$ 4,647
<b>Total employee cost:</b>	<b>\$16,876</b>

If a math tutor could be eliminated at each of the 3-5 schools, the annual savings would be: \$50,628.

\*Estimate of benefits is 38% of the employee's salary – per Chris Liebke, H.R. Director. The actual benefit value will vary per employee depending on the actual benefits they choose to receive.

*Evaluate the need for Curriculum Coordinators.*

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**Recommendation:** It is not recommended to reduce the Curriculum Coordinator at this time; however, this area should be continually evaluated to insure all positions can be cost justified.

**Summary of Findings**

**Discussion:**

Through speaking with Lorraine Tacconi-Moore, Director of Curriculum, and Stephen Foster, Superintendent of Schools, it was learned that the primary duties of the Curriculum Coordinators are as follows:

- To ensure alignment of the curriculum from grades K-12.
- To monitor our teachers to ensure they are teaching the curriculum correctly.
- To train new teachers on our curriculum and train all teachers on new curriculum.
- To help teachers improve their teaching in a particular subject that may not be their specialty.
- To analyze MCAS results.
- To write some grants and provide periodic reports as required by a particular grant. (We will receive approximately \$250,000 in grant money this year through the efforts of the Curriculum Department employees).

It was apparent after learning more about the role of the Curriculum Coordinators that they are a necessity to the Westford Public Schools. With the high growth rate of the school system and anticipated high turnover of teachers due to retirement, their training role is key. In the foreseeable future, a reduction in this area would seem to have a negative affect on our educational system. In the more distant future, once growth stabilizes and retirement slows down, there may be an opportunity to reduce some of the Curriculum Coordinator positions. Due to the size of our entire school system, a certain number of these positions will always be required since the Curriculum Director alone could not fulfill all the duties these individuals perform.

*Evaluate overtime so that we either reduce it or charge for it.*

**Recommendation:** We recommend that each school administrator work to find ways to reduce the overtime and charge to a third party when warranted.

### Summary of Findings

**Description:** Our commission encourages the school to closely evaluate overtime to understand what triggers the need for overtime. For instance, if every week we require janitors to keep our buildings open for basketball, perhaps this cost should be shifted to those who benefit, much as the cost of referees, etc. are shifted to the user group. Traditionally, we have not charged for use by recreational groups, such as basketball, but like use of our town fields, we should consider covering the cost of that use by the participants, as the Recreation Department has recently started.

If the overtime is incurred to benefit an out-of-town group, we should ensure that the fee charged to the out-of-town group accurately compensates for the services provided. Looking at the chart below, "Building Use" represents building rental receipts and "Custodian Extra Detail" represents reimbursement of custodian fees by civic groups that use the school buildings. Comparing the receipts and expenses columns, it appears that we are covering expenses related to these rental uses so there may not be much room for raising these fees. It is not clear from these charts whether we are charging all of the expenses that we incur against our receipts since our overall overtime expenses were in excess of \$140,000 (see attached chart).

#### **SUMMARY OF FY 03 REVOLVING ACCOUNTS**

FUND	BAL 7/1/02	RECEIPTS	EXPENSES	BAL 6/30/03
Athletic Revolving	72,674	206,938	(179,371)	100,241
Food Service	224,634	1,163,902	(1,170,380)	218,156
Building Use	70,362	28,697	(11,601)	87,458
Custodian Extra Detail	26,017	52,519	(39,550)	38,986
	393,687	1,452,056	(1,400,902)	444,841

A related suggestion would be that there may be situations where we presently incur overtime where there is an opportunity to manage the overtime by limiting the hours that our buildings are open to outside groups to specific nights or specific hours. For instance, one idea suggested is to allow public hearings on one or two nights a week, not every night, or to allow groups to use the buildings cost free only on certain nights so as to provide incentives to groups to focus their use on certain evenings thereby allowing us to close down most of our facilities on other evenings. We can then manage our staffing to those specific days and hours to minimize overtime.

Finally, the attached chart indicates that during the last year the overtime at certain schools increased substantially and at others it was even with the prior year. It would appear that there should be a way to manage that overtime to minimize it or find someone to reimburse us for it if it is necessitated by a third party. Since the increase year-to-year was nearly \$40,000 there may be a significant opportunity for savings.

10/03/2003  
08:43:05

Westford Public Schools  
CUST & MAINT OVERTIME FY02/FY03  
FOR PERIOD 13 OF 2003

ACCOUNTS FOR:  
100 GENERAL FUND

FY02  
ACTUALS

FY03  
ACTUALS

10093 10308 CUSTODIAL SALS,WA,OVERTIME	34,630.24	41,095.04
16547 10308 CUSTODIAL,SALS,BLANCHARD,OT	15,982.28	15,870.12
17547 10308 CUSTODIAL,OVERTIME,STONY BROOK	.00	2,980.15
31540 10308 CUSTODIAL,SALS,ABBOT,OT	9,255.05	13,127.52
32047 10308 CUSTODIAL,SALS,DAY,OT	6,062.86	6,199.68
33060 10308 CUSTODIAL,SALS,CRIS,OT	4,046.39	14,951.25
70060 10308 CUSTODIAL,SALS,NAB,OT	3,201.09	4,608.60
80064 10308 CUSTODIAL,SALS,ROB,OT	5,073.53	4,963.71
81060 10308 CUSTODIAL SALS,MILLER,OVERTIME	.00	15,136.35
99060 10408 MAINT,SALS,S'WIDE,OT	17,126.07	25,029.36
TOTAL GENERAL FUND	95,377.51	143,961.78
TOTAL EXPENSES	95,377.51	143,961.78
GRAND TOTAL	95,377.51	143,961.78

*Evaluate each school's maintenance cost, i.e. electricity, janitorial, etc. to ensure they are in line with industry standards.*

**Recommendation:** We recommend the following:

- Evaluate our janitorial staffing vs. building square footage for possible reductions
- Have an outside source conduct an energy audit to suggest opportunities for improved energy efficiency.
- Develop a method to reward those that implement measures to reduce our energy costs.

### Summary of Findings

#### **Description:**

**Janitorial:** Although it appears that our janitorial staff is fairly lean (about one custodian per 25,000 s.f. of building area – see chart below), based on industry standards, there may be some potential for marginal decreases. We would suggest that we take a hard look at the actual square footages of certain buildings to make sure that our staffing per square foot is appropriate, and in the case of our larger buildings, there may be some opportunity for reductions due to recently modernized equipment and the efficiency of doing larger areas.

#### **JANITORIAL STAFFING**

School	Gross SF	# Custodian	Current Ratio SF: 1.0 Custodian
Nabnasset	62,050	2.5	24,820:1
Robinson	56,875	2.5	22,750:1
Miller	79,900	3.0	26,633:1
Abbot	63,160	2.5	25,264:1
Day	61,150	3.0*	20,383:1
Crisafulli	83,100	3.0	27,700:1
Blanchard	112,000	4.5*	24,888:1
Stony Brook**	150,000	5.0	30,000:1
Westford Academy**	296,900	9.0	32,989:1

\* .5 paid by Building Use Funds

\*\* Based on school building figures, we believe the Stony Brook School is 125,000 s.f. and the Westford Academy should be 240,000 s.f.

Electricity: If any of our school buildings have not been recently checked with energy audits, there have been significant technological innovations in recent years and there may be some opportunity for savings that have come along since a previous audit was done. Power companies will often assist in this kind of an audit at little or no cost to the building owner. The commission was encouraged to see a number of energy saving updates to our older buildings that have been done on an ongoing basis during summer months at our older facilities such as new windows at Abbot, switching buildings to gas heat, etc.

Another suggestion would be to have one person on the janitorial staff from each building responsible for the energy costs and ideas to save on energy. The appearance to the outsider is that all of the lights in all of the buildings are left on for lengthy periods of time after school is over. If there were one person tasked in each school to find ways to shut lights off, turn back thermostats and find other ways of saving energy, much as a homeowner would do, there may be a myriad of small ways to save. The commission would encourage the school to find some way of providing incentives to staff members by rewarding them for cost savings that are achieved. This would probably also minimize the likelihood of a recurrence of the problem we recently had with the Westford Academy electric bill that ran \$270,000 in one year and was projected to run \$215,000 the next year.

*Evaluate school calendar for ways to decrease building cost.*

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**Recommendation:** We recommend the administration keep in mind ways to reduce our energy costs when creating the yearly school calendar.

### **Summary of Findings**

**Description:** This proposal is whether to expand our school days off during the winter season, such as around Christmas, when our energy costs are highest so as to lower our overall cost and extend our school calendars at the beginning and end of the year when our costs are relatively low due to the milder weather. An alternative suggestion was to cluster vacations in one two week March vacation versus a week in February and a week in April using the same rationale. Another suggestion that was made was that when we return from vacations we should return at the beginning of the week instead of for a couple of days at the end of the week so that the building is not brought up to occupied heat settings for a few days and then set back. We also recommend that professional development days be on Fridays and Mondays for the same reason.

*Evaluate buildings open evenings.*

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**Recommendation:** We recommend the administration establish an informal policy on how our buildings are used in the evenings with the underlying goal being to minimize our utility expense.

**Summary of Findings**

**Description:** This proposal is to look at how our buildings are used in the evenings and whether there is an opportunity to limit the number of buildings or areas within our larger buildings, such as the Academy, that are open during evenings so as to minimize cost. One proposal would be to limit public meetings or school activities meetings to one or two evenings. Another would be to limit student activities or performances to certain areas of the buildings and close off large portions of our larger buildings extinguishing lights and setting back thermostats so as to manage our energy costs.

***Implement a better system to identify children attending Westford schools that do not have residency in Westford.***

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**Recommendation:** We recommend implementing improvements to our system, such as those described in this document, to obtain more names of those students that attend Westford schools that are not Westford residents.

### **Summary of Findings**

#### **Discussion:**

It is required under M.G.L. Chapter 76, Section 5, and our school policy to educate students that are residents of Westford. We know there is some percentage of students that are currently attending Westford Schools that do not have residency in Westford. This action causes the taxpayers a significant amount of money.

The Administration, when they are aware of a student that potentially does not live in Westford, takes the appropriate actions to investigate the situation, then acts accordingly. The problem is getting the names of those students that potentially do not have residency in Westford to the Administration so they can take action. It is our recommendation that the School Department be more proactive in trying to get these names. We currently address this issue with the teachers and request they bring forth any student name who they question as to whether or not they have residency. It is our recommendation that we broaden our scope of people who bring these names forward, specifically students and parents. It is our opinion, through educating parents and students on this issue that more names will surface to the Administration.

Some suggestions are as follows:

1. Educate people on this problem through school newsletters, flyers sent home and/or discussion at a televised School Committee meeting. Be specific as to the policy and how educating non-residents will cost the town money and/or affect services to those students that do live in Westford. Encourage people to bring forth names of students that may not have Westford residency. Explain that doing this will help the entire Westford school system.
2. Set up a system whereby people can anonymously submit a name of a student they feel may not be a Westford resident. For example, a phone number where they can leave an anonymous message, a drop box where they can put a note etc...
3. Continually bring this issue up to parents/students to maintain awareness and encourage submittal of names, i.e. a monthly or quarterly note in the school newsletters.

As a side note, in one of our meetings, 4/8 members knew of at least one student within the last few years that attended Westford Schools that did not live here. This is not to suggest that the problem is of this magnitude, but we do feel it is big enough to warrant more aggressive action.

**Pros:**

- Aggressively implementing our policy of only educating Westford residents will save our Town money. In the difficult financial situation we are in, removing the non-resident students may make the difference between saving a teacher/program and cutting it.
- By addressing this issue, therefore freeing up seats in the classrooms, we have the opportunity to open up school choice which will bring in revenue for the schools while keeping the class size to our standards.
- Having a system where parents and students are comfortable bringing forth names will encourage those people to act that may currently be frustrated by this problem.

**Cons:**

- It will be difficult from an emotional standpoint, and time consuming to remove students from the system.

# **Part 5**

## **Appendices**

## Appendix A –

### Commission for Efficient Town Government Overall Plan

September 24, 2002 Rev. 02

Approved 10/3/02

**Commission Purpose:** The purpose of the Commission is to work with the Town Manager and Administrative Staff on the development of a multi-year plan to close the forecasted gap between revenues and expenditures over the course of the next five years.

**Overall Plan Introduction:** Outlined below is the Overall Plan for the Commission for Efficient Town Government. This plan will be used as a guide to the group to ensure that we remain focused on accomplishing our objectives and that all activities are completed prior to disbandment of the Commission. This plan is not written in order of how we will approach our task and will be updated as deemed necessary by the Commission.

#### Overall Plan

1. Establish Commission Values
2. Ensure effective, two way communication with the Town Departments, Boards and Public as to our objectives, process and accomplishments.
  - a. Develop and implement a communication plan
    - i. Provide quarterly reports to Selectmen if appropriate
    - ii. Provide an update on Commission activities at all meetings
    - iii. Send letter to department heads introducing the Commission etc..
    - iv. Develop a web page to provide our citizens with information on the Commission, include a “frequently asked questions” section
    - v. Submit press releases as needed
3. Evaluate the long term budget projections to aid in project decision making.
4. Measure and publish the Commissions accomplishments against our objectives.
5. Determine adequate levels of service, staffing and spending for all departments
  - a. Understand current metrics, spending and staffing
  - b. Evaluate other towns metrics, spending and staffing levels
  - c. Implement recommendations for new metrics and staffing if appropriate
  - d. Identify mandated vs. traditional vs. optional services provided by the town.
6. Evaluate the current town organizational structure for the following and make recommendations for improvement:
  - a. Efficiency of operations
  - b. Elimination of duplication of effort/resources/organization
  - c. Evaluate alternatives for providing services, e.g. privatization
  - d. other

## **Overall Plan – continued**

7. Evaluate and Implement appropriate cost reductions
  - a. Investigate and implement efficiency improvements
  - b. Segregate departmental wants vs. needs
  - c. Investigate all spending areas and implement changes to reduce spending
  - d. Determine the best method/organizational structure for the repair, construction and maintenance of all town capital assets.
8. Evaluate and implement additional sources of revenue
  - a. Areas to investigate:
    - i. Fees
    - ii. Selling town assets
    - iii. Grant options
    - iv. Mitigation money
    - v. Other
9. Analyze the budget/spending system and implement improvements
  - a. Evaluate and change budgeting methods to encourage departmental cost savings, improved productivity and line item accuracy, while rewarding good performance.
    - i. Evaluate putting all costs and revenues associated with each department, i.e. OH, debt service, fees, thus establishing individual cost centers.
    - ii. Ensure all money spent is categorized properly to allow for an accurate understanding of town wide expenditures.
    - iii. Develop a system whereby department heads are rewarded for saving money, and not penalized if the next year's budget is higher or they need to request additional funds mid-year due to a tight budget.
    - iv. Other
  - b. Evaluate the capital budget system
    - i. Should firm quotes be required?
    - ii. Evaluate the use of excess capital funds
    - iii. Other
  - c. Ensure latest actuals are provided for the budget process
  - d. Determine adequate approval levels for purchases.
  - e. Improve understanding and cooperation between departments to aid in increased efficiency and cost savings
  - f. Implement recommendations post evaluations
10. Evaluate and implement appropriate training programs for town departments and committees
11. Determine and implement appropriate programs for continuous improvement
12. Ensure systems are in place to ensure that the work accomplished with this commission remains in place.

**Appendix B –  
Individual Department Responses**

Department responses are found in the copies of this report at the Town Manager's office and the J.V. Fletcher Library.